

# OUTDOOR ADVENTURE PARK

— FEASIBILITY STUDY —



City of  
Carlsbad

August 2017



## Acknowledgements

### **City of Carlsbad Council Members**

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Council Member Mark Packard  
Council Member Michael Schumacher  
Council Member Cori Schumacher

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## CHAPTER ONE – EXECUTIVE SUMMARY

### 1.1 OVERVIEW

The City of Carlsbad Parks & Recreation Department commissioned a feasibility study for an outdoor adventure park (Figure 1).

This plan will examine whether there is community need and market support/location, economic and environmental feasibility for an outdoor adventure park.

#### Needs Assessment and Comprehensive Action Plan

In Dec. 2013, the City Council accepted the Parks & Recreation Needs Assessment and Comprehensive Action Plan, which included a strategic action plan that serves as a guide for priority development, capital improvement planning, and park, facility and amenity development for a period of five years.

#### CAPRA Accreditation

As the Department sought CAPRA accreditation for best practice operational standards, the needs assessment was updated to a Master Plan and accepted by the City Council in March 2015. The needs assessment served as an element of the master plan. This planning process resulted in two Big Ideas guided by community vision and needs.

#### Purpose

The purpose of an outdoor adventure park includes a variety of programming, from fitness and wellness, adventure and environmental education programs, youth summer camps, and special events. These types of spaces could include options from mountain biking/dirt biking, rock or wall climbing, zip lines and canopy tours, interpretive education opportunities, ropes courses, outdoor events space or an amphitheater, mud course or artificial obstacle courses, etc.

With a community that loves and appreciates outdoor recreation and a large corporate presence seeking outdoor teambuilding activities, this type of facility could serve a wide variety of individual and group outdoor recreation needs in the community while potentially becoming a regional and national



Figure 1. Map of the City of Carlsbad



destination. This type of facility also lends itself to partnership models with public, private or nonprofit providers for design, development and operation.

## 1.2 PROCESS STEPS

Key process steps undertaken as a part of the feasibility study:

1. Demographic overview
2. Other service providers/market opportunities
3. Community input
  - a. Key leader and stakeholder focus group meetings
  - b. Open public input meetings
  - c. Online survey
  - d. Statistically reliable survey

## 1.3 DEMOGRAPHIC OVERVIEW

The Demographic overview analysis provides an understanding of the Carlsbad's population. This analysis is reflective of the total population, and its key characteristics such as age segments, income levels, race, and ethnicity.

### **Total Population**

The city has recently experienced a rather significant population increase of approximately 4.51 percent; from 105,328 in 2010 to 110,081 in 2015. The current estimated population is projected to continue its rapid growth, increasing to 115,622 individuals in 2020, and 125,785 by 2030.

### **Median Income**

The city's median household income (\$90,603) and per capita income (\$47,554) are both well above the state and national averages.

### **Age**

Based on the 2010 Census, the population of the target area is just slightly higher (41.5 years) than the median age of the U.S. (37.2 years). Projections show that the service area will undergo an aging trend throughout 2030, as the 55+ age group grows to represent over 36 percent of the total population.

### **Race/Ethnicity**

The estimated 2015 population is predominantly White alone (81.13 percent), with Asian (7.76 percent) population representing the largest minority. Future projections show that by 2030 the overall composition of the population will become more diverse. Forecasts of the target area through 2030 expect decreases in the White alone (76.65 percent) population; coinciding with slight increases in the population for all other race segments.

#### 1.4 OTHER SERVICE PROVIDERS/MARKET OPPORTUNITIES

Based on city staff input and the consultant's operational experience, it was determined that a drive time of 15, 35 and 50 minutes or less would be considered as a primary target audience for the proposed outdoor adventure park.

Activities considered in this similar provider analysis were zip lines, trampoline parks, paintball, BMX facilities, rock climbing, archery, outdoor obstacle course and disk golf facilities. The drive time map depicts the variety of service providers within a 15 minutes (in pink) and 35 minutes (in blue) and 50 minutes (in orange) driving distance.

##### **Summary**

A drive time map review and comparison of similar providers (e.g. Crossfit) versus true competitors (e.g. YMCA) reveals that there are very few true competitors and adequate potential in the Carlsbad market for a proposed outdoor adventure park to serve an unmet community need (**Figure 2**).

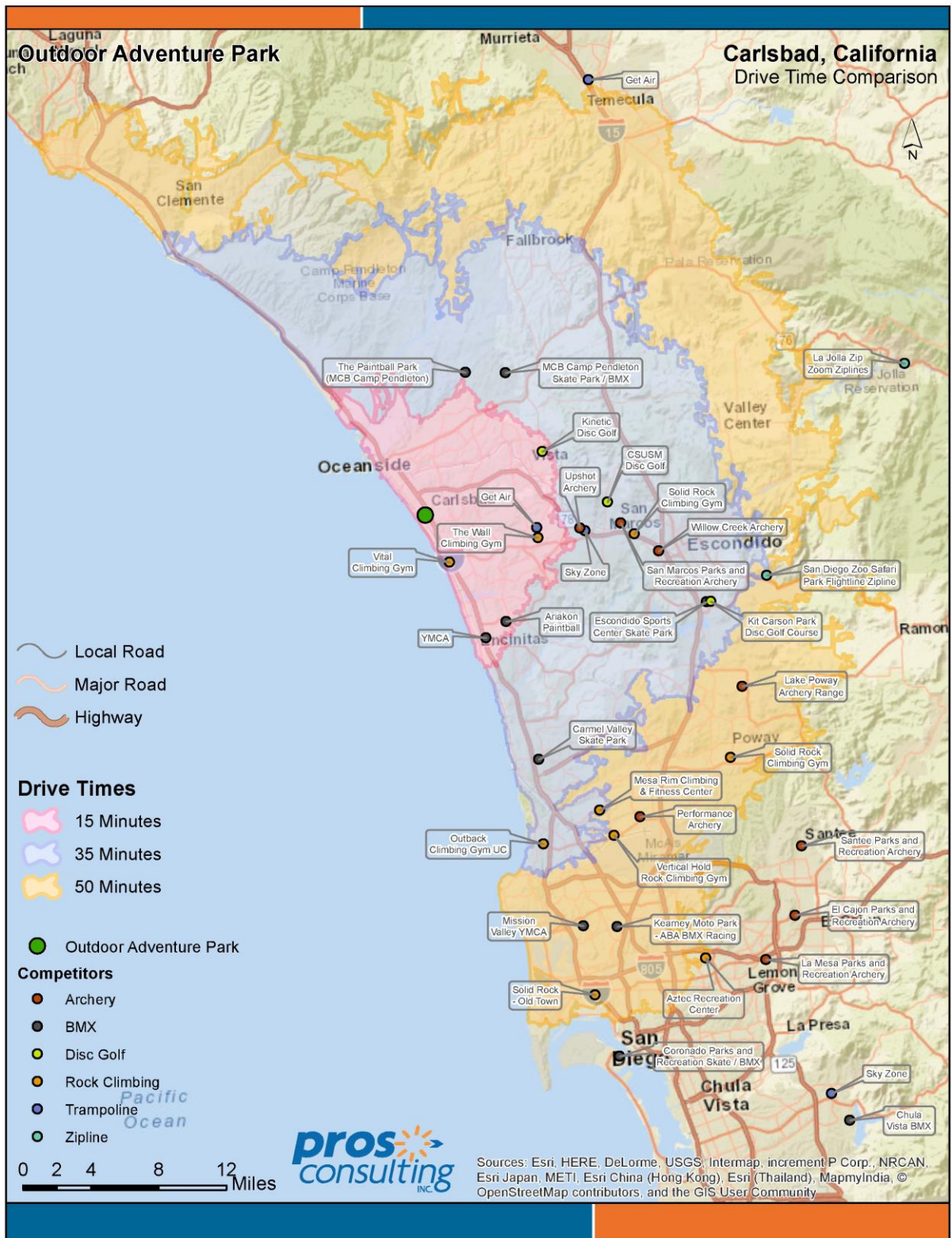


Figure 2. Drive Time Map of City of Carlsbad



## 1.5 COMMUNITY INPUT

Parks & Recreation Department staff and the consulting team conducted a variety of community and key leader outreach initiatives to identify the level of support and vision for financial viability for the proposed facility. This included:

- **Stakeholder interviews and public meeting** (Dec. 10-11, 2015)
- **Key leader interviews** (Council and Commission interviews – Feb. 9, 2016)
- **Online survey** (1148 survey respondents)
- **Statistically reliable survey** (502 survey respondents)

The groups and individuals included:

- City Council Members
- Parks and Recreation Commissioners
- Senior Commissioners
- City leadership
- Parks & recreation staff
- Encinitas YMCA
- Carlsbad Boys and Girls Club
- Regional leaders – San Diego County Parks & Recreation Director
- Community interest groups and local residents

The summary of community input findings:

Summary of Community Input Findings		
<b>High level of support for the Outdoor Adventure Park based on respondents' indicated frequency of use as well as paying to use the park</b>	<b>Online</b>  78% indicated they would use the park at least a few times / month;  63% indicated a willingness to pay (check, pay per visit, monthly auto-debit) while 21% were not willing to pay to use the park	<b>Statistically Reliable Survey</b>  80% indicated they would use the park at least a few times / month;  71% indicated a willingness to pay (check, pay per visit, monthly auto-debit) while 29% were not willing to pay to use the park
<b>Top choices include exercise path, zipline and mountain bike trail</b>	Exercise path, zipline, skate Parks, velodrome, cycling track and mountain bike trails were the top five choices for frequency of use	Exercise path, outdoor fitness course, zipline, mountain bike trails and rock climbing wall were the top five choices for frequency of use
<b>Confidence in city staff to operate the park based on a successful precedent i.e. Alga Norte Park</b>	49% were supportive while only 24% were not supportive	51% were supportive while only 7% were not supportive
<b>Strong support for placing measure on the ballot for a vote to develop Outdoor Adventure Park</b>	77% were supportive while only 11% were not supportive	71% were supportive while only 12% were not supportive

## 1.6 SITE ANALYSIS

In the summer of 2016, Stantec and City staff walked two park sites, Zone 5 and Veterans Park, that seemed the most viable to determine if either of them was more feasible for an outdoor adventure park.

While there was some initial thought to split the outdoor adventure park between the two parks to reduce the footprint and impact of the proposed activities in the parks, it was decided against to preserve the vision proposed by Big Idea 2.

Zone 5 park seemed to have potential to be a center for corporate fitness for the local businesses adjacent to the park as well as other Carlsbad residents (**Figure 3**). This park site would feature the more extreme activities such as a zip line, ropes courses, and other adrenaline fueled outdoor fitness stations (**Figure 4**). This would allow for corporate retreats, team building exercise, and possible corporate sponsorship from the nearby businesses and be a good outlet for regional thrill seekers. Ultimately, it was determined that the site didn't fit the criteria for the project. It only had one access point and a lack of available parking. It also didn't have enough space to create a regional outdoor adventure park that had the amenities that the community was requesting.

### ZONE 5

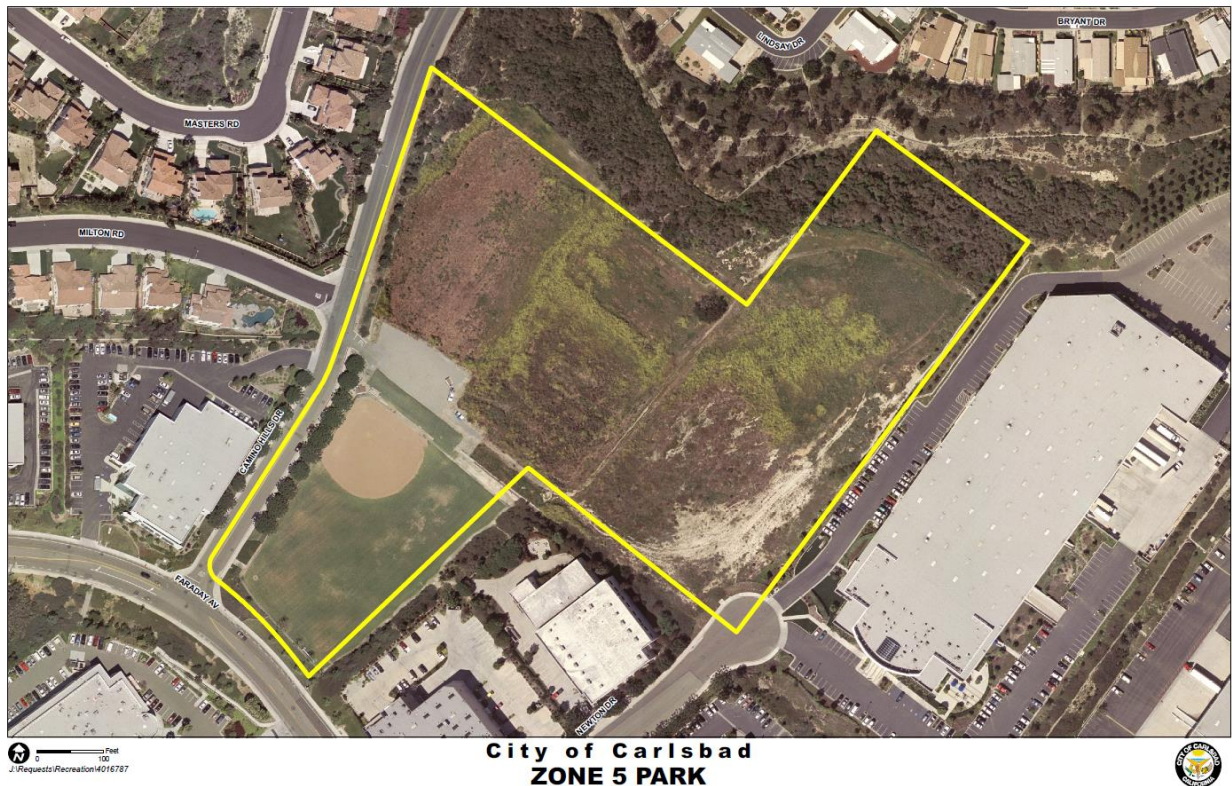
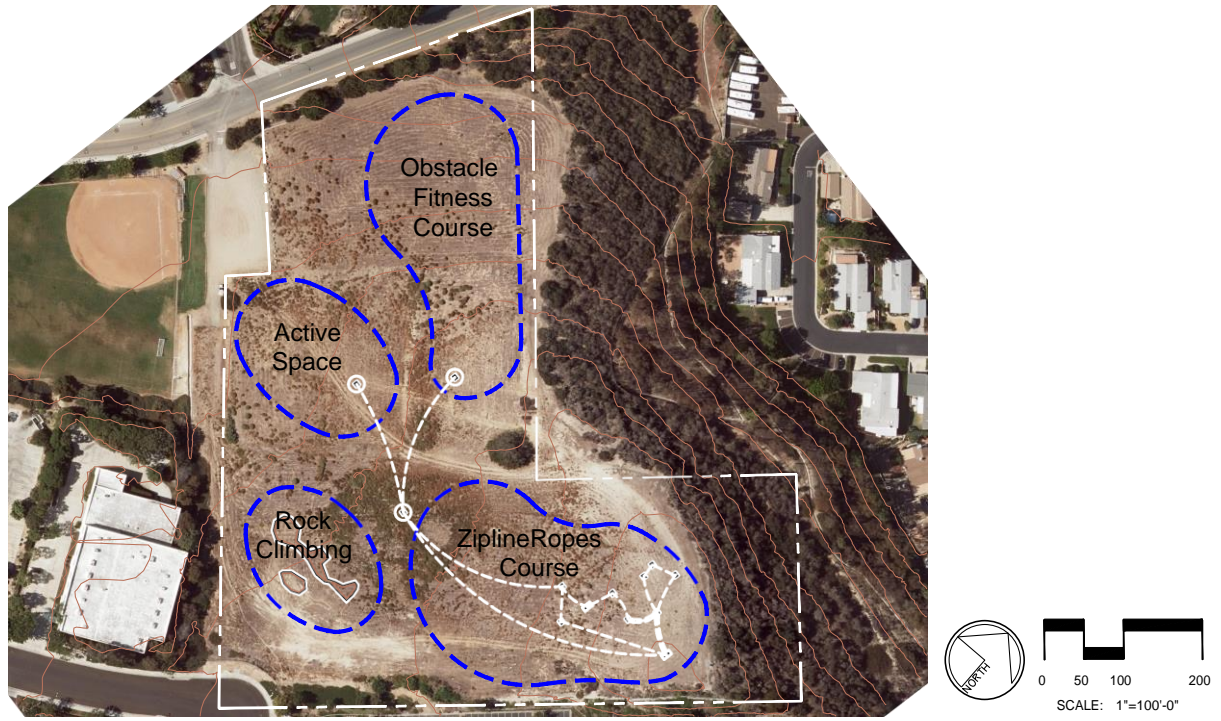


Figure 3. City of Carlsbad Zone 5 Park



Approx. 8 Acre Corporate & Community Fitness Park  
City of Carlsbad Zone 5 Park

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9179 Aero Drive, San Diego, CA 92123  
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**Figure 4. Zone 5 Adventure Park Layout**



## VETERANS PARK

Veterans Park lent itself to feature more of the walking trails, exercise nodes, mountain bike trails, pump tracks, and other healthy fitness activities that could be designed into the natural terrain and topography of the site. The site was already used for walking and running trails so it would be easier to enhance the activities that had already been introduced to the site. These activities would also appeal to users who wanted to have some of the outdoor adventure activities without the impact of a zip line or ropes course on site to try to preserve a little bit more of the passive park feel of the existing park. The goal was to also add more parking, staging areas, and a Veterans memorial somewhere on site to honor the veterans at the park site.

Veterans Park being the larger site was the reason it was decided to combine all the activities into one outdoor adventure park. It had more access points, more room for parking, and great topography to also include a zipline and ropes course along with all the other original planned amenities.

After potential site impacts were analyzed through an environmental constraints assessment and an opportunities and constraints exhibit, it was determined that there wasn't sufficient developable park acreage at Veterans Park to include all the elements needed for the Outdoor Adventure Park, consistent with the master plan Big Idea.

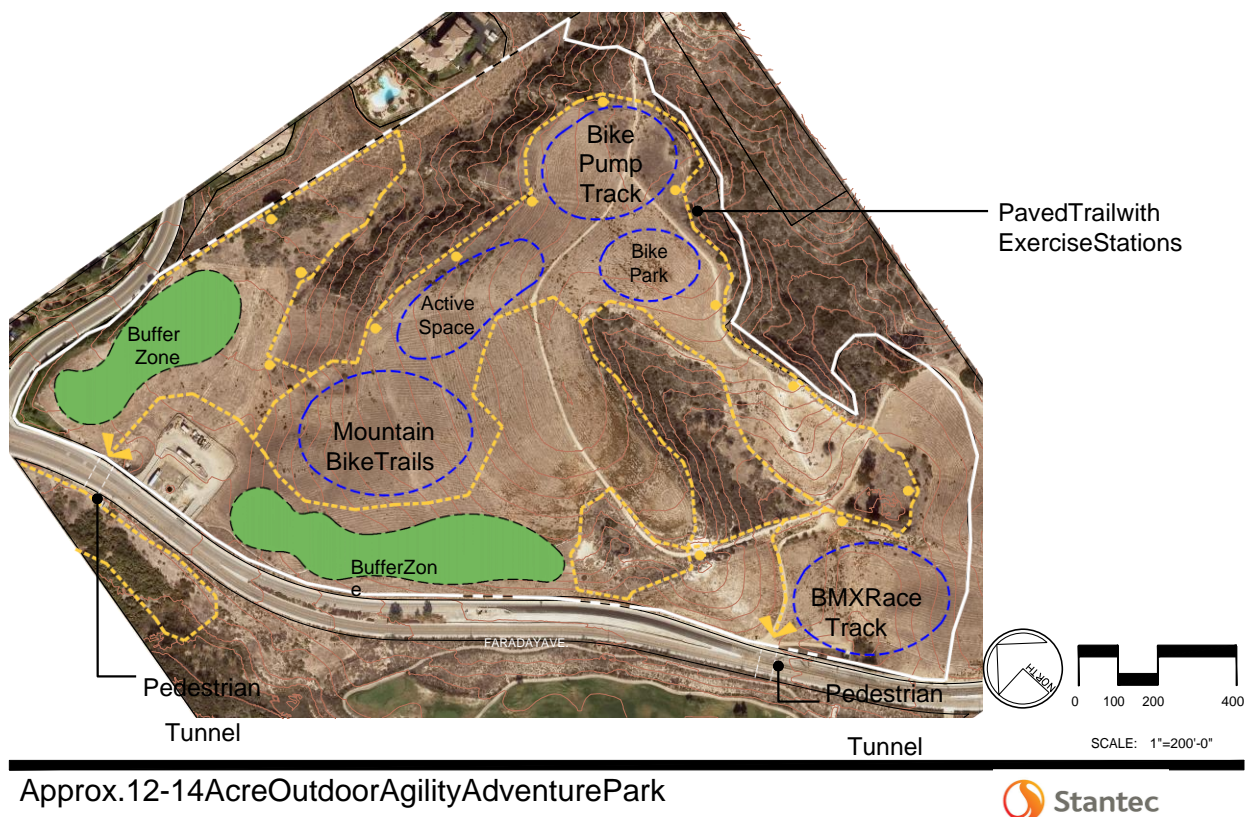


Figure 5. Veterans' Adventure Park Layout



## 1.7 CONCLUSION

Based on community input, demographics and trends analysis, market and gap analysis and consultation with the city's community & economic development planners and staff, the consulting team arrived at the following conclusion and recommendations.

There is a community support and a market gap for an outdoor adventure park that can serve as a regional destination in the City of Carlsbad. However, for it to fulfill the vision of Big Idea #2 and function as a true regional draw, it requires a significant footprint. Based on the assessment, the existing space limitations, neighborhood impacts and environmental concerns on city-owned park site do not serve adequately to recommend Big Idea 2.

As for specific sites, Zone 5 Park lacks the total acreage to contain the desired adventure park amenities to attract a regional audience. Additionally, mitigating noise and use impacts to the community living in adjacent housing will be a challenge.

The developable portion of the future Veterans Park site is large enough to accommodate the regional outdoor adventure park concept; however, significant environmental constraints (noise, lighting and use impacts) exist surrounding the park, which would make developing and permitting an adventure park at that location undesirable and not recommended.

Neither Zone 5 nor the future Veterans Park site provide an opportunity to fulfill the intended vision of Big Idea 2 in serving community need to the greatest extent possible. However, given the popularity and expressed community need for outdoor adventure amenities, individual offerings may be considered in future park development as the opportunity arises.

## CHAPTER TWO COMMUNITY INPUT

### 2.1 STAKEHOLDER AND FOCUS GROUP MEETINGS

Stakeholder interviews and focus group meetings are an important part of the community input process.

Sessions encourage participants to identify the issues, opportunities, and challenges facing Carlsbad in developing a proposed outdoor adventure park. By engaging community leaders through individual interviews, small group discussions, or focus group settings, the process ensures that the feasibility study is built collaboratively.

In Feb. 2016, the planning team conducted a series of 12 individual or group focus group meetings with community stakeholders, City Council members, Commission members, YMCA, city manager, and the mayor.

The following sections summarize the questions and answers from the interviews and focus group sessions. At the beginning of each discussion, participants were told individual responses would not be attributed to specific individuals in order to allow for freedom in providing constructive feedback. The responses from participants are listed in summary form. The most common or shared responses are listed first, and each list proceeds in descending order of frequency of answers.

*Note: Summary input is a reflection of the responses provided by the attendees and not a consultant recommendation or a statement of fact. Thus, what one respondent might consider to be a strength might be an area for improvement for another attendee.*

#### 2.1.1 WHAT IS YOUR TAKE ON PARTNERSHIPS FOR THE POTENTIAL OUTDOOR ADVENTURE PARK? WHO, IF ANY, ARE POTENTIAL PARTNERS THAT WE SHOULD CONSIDER?

- City should not run the outdoor adventure park
  - Not qualified, trained, or have the expertise in managing this type of facility
- Cautious of managing risk and liability – outside partner would help ease this concern
- Potential partners
  - GoApe, San Diego Sports Commission, tourism partners, etc.

#### 2.1.2 WHAT DOES THE FEASIBILITY LOOK LIKE FOR THE POTENTIAL OUTDOOR ADVENTURE PARK?

- Outdoor adventure park should be 100 percent cost recovery
- Needs to be a regional draw, if feasible then should develop it
  - Help drive economic impact
- If tax payers developed it then should have limited fees to residents
  - Resident discount model

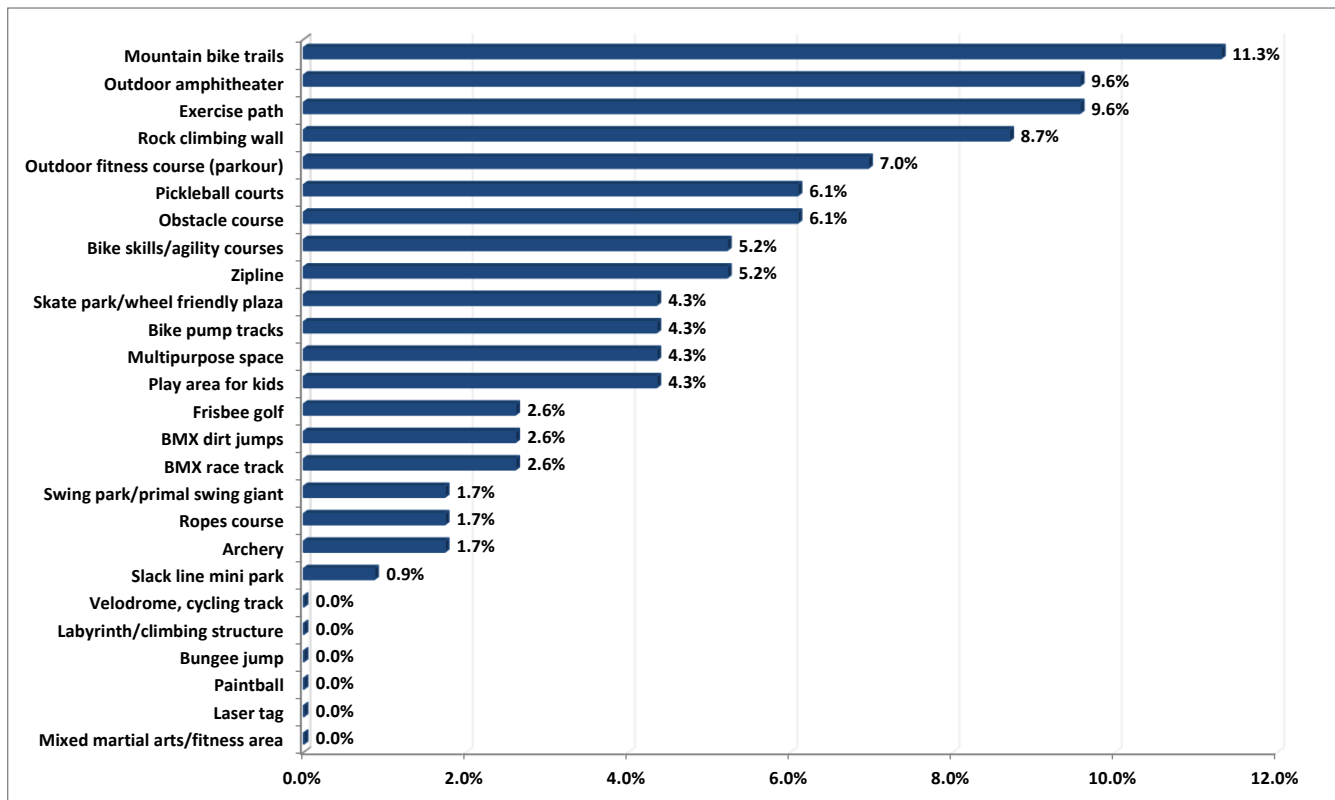
## 2.2 FOCUS GROUP QUESTIONNAIRE

As part of the community input process, PROS and the Parks & Recreation Department conducted a focus group questionnaire to gain an understanding of desired features and amenities of Carlsbad residents in relation to an outdoor adventure park. The questionnaire was distributed in Dec. 2015 and had a total of 24 participants.

### 2.2.1 OUTDOOR ADVENTURE ACTIVITY PARK QUESTIONNAIRE RESULTS

#### PLEASE SELECT YOUR TOP 5 MOST DESIRED AMENITIES.

The amenities that received the most top five votes were mountain bike trails (11.3 percent), outdoor amphitheater (9.6 percent), and Exercise path (9.6 percent). Mixed martial arts/fitness area, laser tag, paintball, bungee jump, labyrinth/climbing structure, and velodrome/cycling track all tied for the least popular amenities, each receiving no votes (**Figure 6**).



**Figure 6. Features Households Most Likely Use**

## 2.3 COMMUNITY ONLINE SURVEY

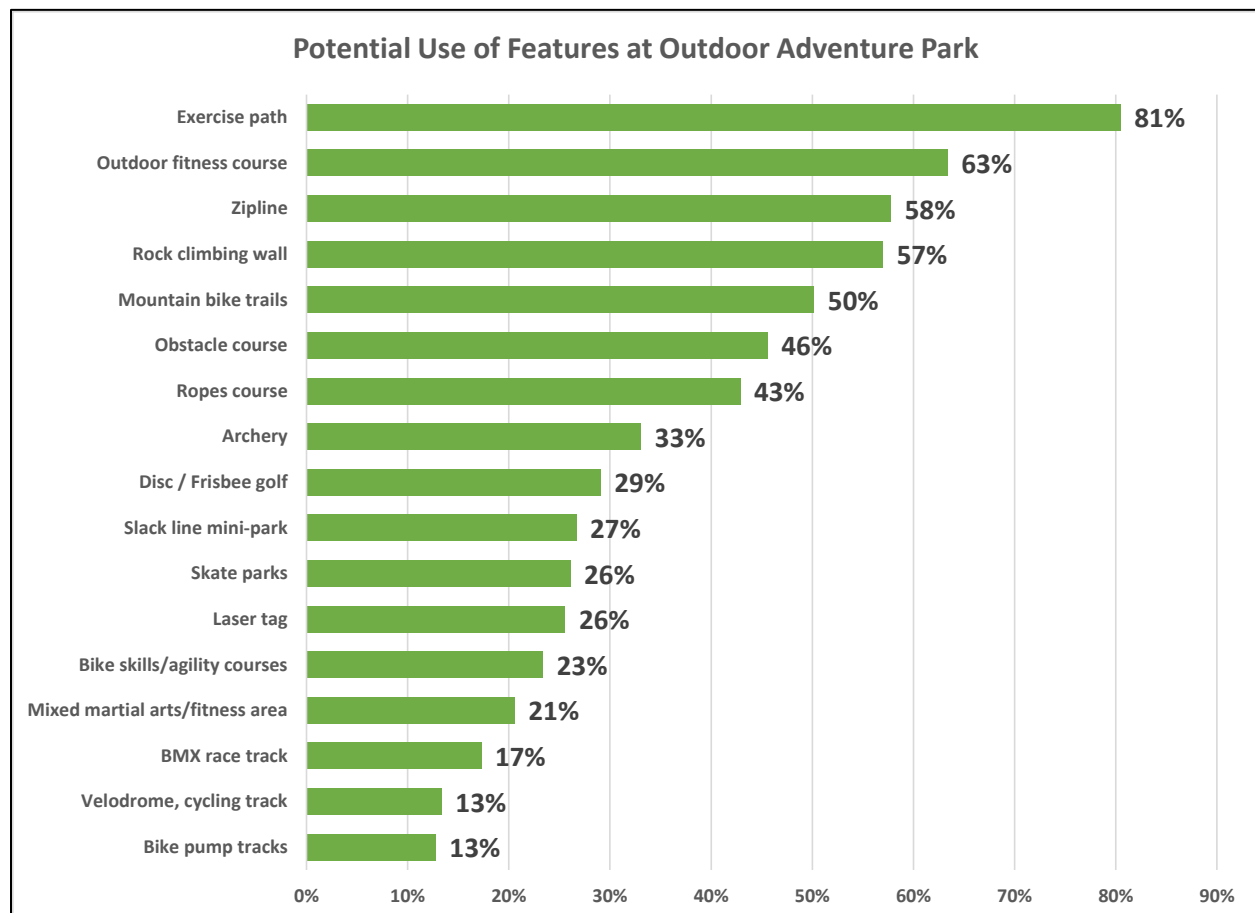
PROS Consulting conducted an online survey to gain an understanding of the characteristics, preferences, and satisfaction levels of Carlsbad residents in relation to an outdoor adventure park. The survey was available from Feb. 9 through March 10<sup>th</sup> and received a total of 1,148 responses.

The online survey emulated the statistically reliable survey questions distributed by ETC. This approach allowed Carlsbad residents another opportunity to provide input even if they did not receive the statistically reliable survey.

### 2.3.1 ON-LINE SURVEY FINDINGS

THE CITY OF CARLSBAD IS CONSIDERING DEVELOPING A NEW OUTDOOR ADVENTURE PARK. LISTED BELOW ARE POTENTIAL FEATURES THAT COULD BE INCORPORATED INTO THE DESIGN OF A NEW OUTDOOR ADVENTURE PARK. PLEASE INDICATE THE FEATURES YOU AND MEMBERS OF YOUR HOUSEHOLD WOULD USE. (CHECK ALL THAT APPLY)

Top features respondents would use at an outdoor adventure park are exercise path (81 percent), outdoor fitness course (63 percent), zipline (58 percent), rock climbing wall (57 percent), and mountain bike trails (50 percent) (**Figure 7**).



**Figure 7. Potential Use of Features**

WHICH FOUR OF THE FEATURES WOULD YOU OR MEMBERS OF YOUR HOUSEHOLD BE MOST LIKELY TO USE IF THEY WERE INCLUDED IN THE NEW OUTDOOR ADVENTURE ACTIVITY PARK? (IF 'NONE' PLEASE LEAVE BLANK)

Top five potential features (**bolded** in table below) most used by respondents for their first choice are exercise path (68 percent), zipline (31 percent). Skate parks (29 percent), velodrome, cycling track (28 percent), and mountain bike trails (26 percent) (**Figure 8**).

Potential Features	1st Choice	2nd Choice	3rd Choice	4th Choice
<b>Exercise path</b>	<b>68%</b>	17%	8%	7%
<b>Zipline</b>	<b>31%</b>	25%	25%	20%
<b>Skate parks</b>	<b>29%</b>	20%	24%	27%
<b>Velodrome, cycling track</b>	<b>28%</b>	11%	30%	30%
<b>Mountain bike trails</b>	<b>26%</b>	28%	28%	18%
Rock climbing wall	20%	24%	30%	26%
BMX race track	20%	20%	20%	39%
Outdoor fitness course	20%	50%	18%	12%
Archery	17%	27%	29%	27%
Bike pump tracks	17%	22%	49%	12%
Laser tag	16%	18%	32%	34%
Disc / Frisbee golf	14%	27%	30%	29%
Mixed martial arts/ fitness area	11%	36%	25%	28%
Bike skills/agility courses	10%	26%	33%	31%
Obstacle course	10%	16%	39%	35%
Slack line mini-park	10%	11%	21%	59%
Ropes course	9%	18%	26%	47%

**Figure 8. Potential Use of Features**



IF THE OUTDOOR ADVENTURE PARK WERE DEVELOPED WITH THE TYPES OF FACILITIES THAT YOU INDICATED WERE MOST IMPORTANT TO YOU AND MEMBERS OF YOUR HOUSEHOLD, WHICH ONE OF THE FOLLOWING STATEMENTS BEST REPRESENTS HOW OFTEN YOUR HOUSEHOLD WOULD VISIT THE ADVENTURE PARK?

Fifty-seven percent (57 percent) of respondents would visit the adventure park once a week or more. Only five percent would never visit the adventure park and three percent did not know how often they would visit (**Figure 9**).

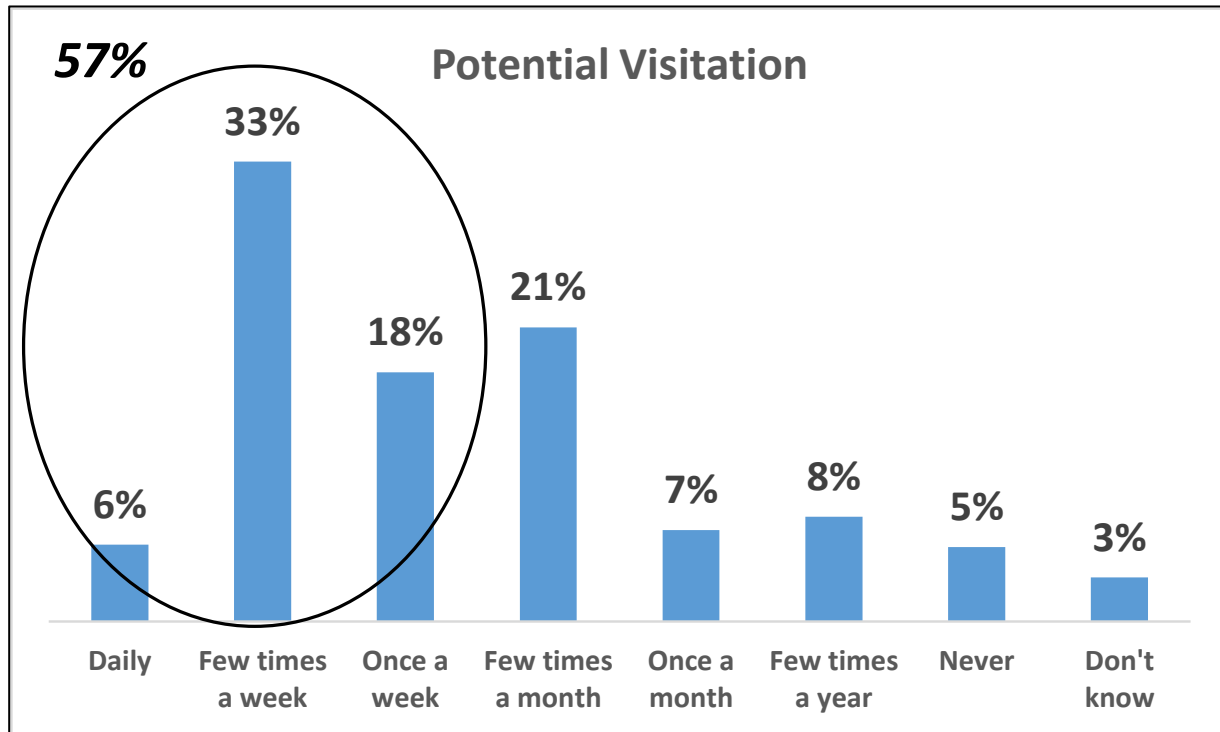
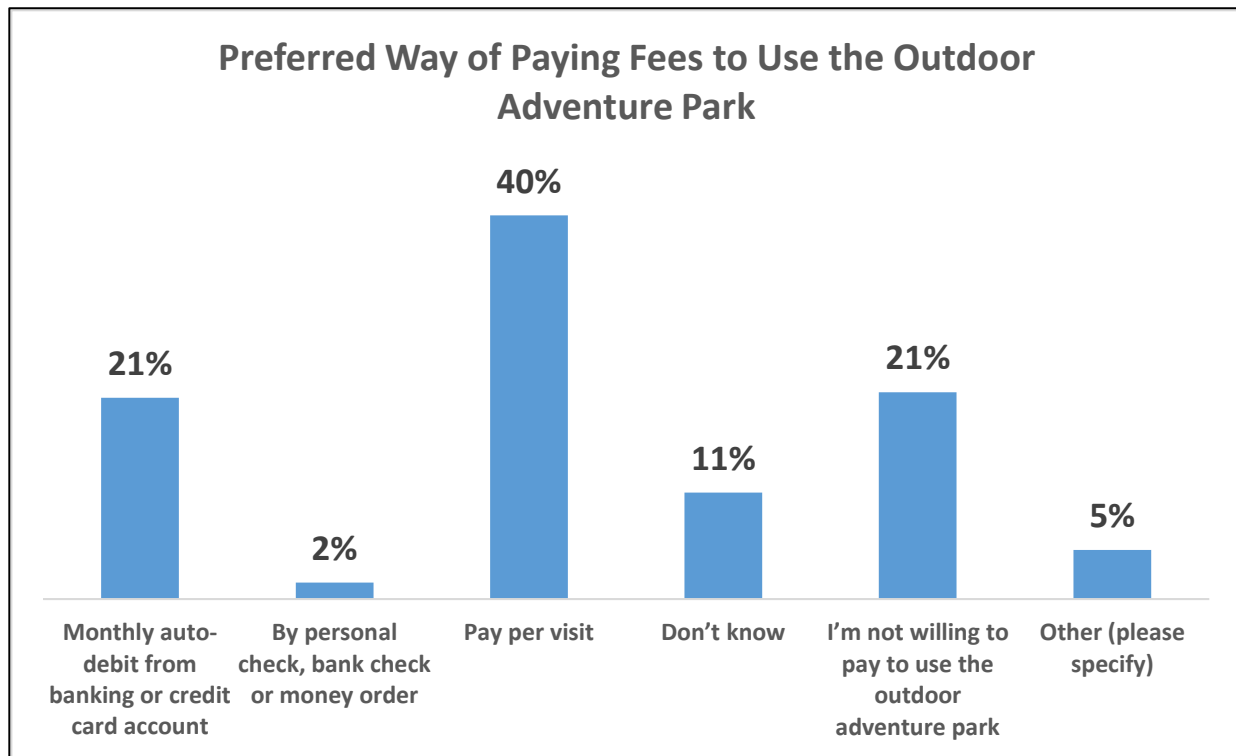


Figure 9. Potential Frequency of Visitation

THE COST OF OPERATING A NEW OUTDOOR ADVENTURE PARK WILL NEED TO BE COVERED BY USER FEES. KNOWING THIS, WHICH ONE OF THE FOLLOWING WOULD BE YOUR PREFERRED WAY OF PAYING TO USE THE OUTDOOR ADVENTURE ACTIVITY PARK IF IT HAD THE FEATURES YOU MOST PREFERRED?

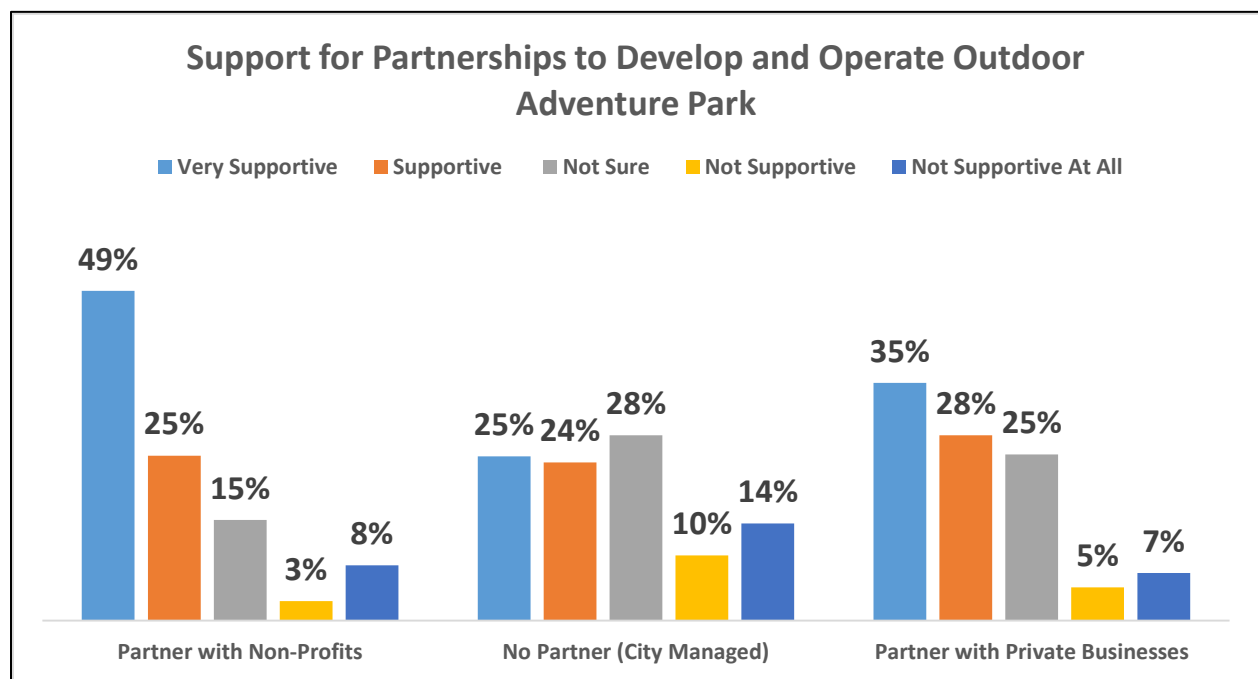
Forty percent of respondents would prefer to pay per visit; followed by either monthly auto debit from banking or credit card account (21 percent) or they are not willing to pay to use the adventure park (21 percent) (Figure 10).



**Figure 10. Preferred Way of Paying Fees**

THE CITY OF CARLSBAD COULD PARTNER WITH OTHER NON-PROFITS OR PRIVATE BUSINESSES IN DEVELOPING AND OPERATING THE OUTDOOR ADVENTURE PARK. FROM THE FOLLOWING LIST OF POTENTIAL PARTNERS, PLEASE CIRCLE HOW SUPPORTIVE YOU WOULD BE OF THE CITY PARTNERING WITH NON-PROFITS OR PRIVATE BUSINESSES ON POSSIBLY DEVELOPING AND OPERATING THE OUTDOOR ADVENTURE PARK.

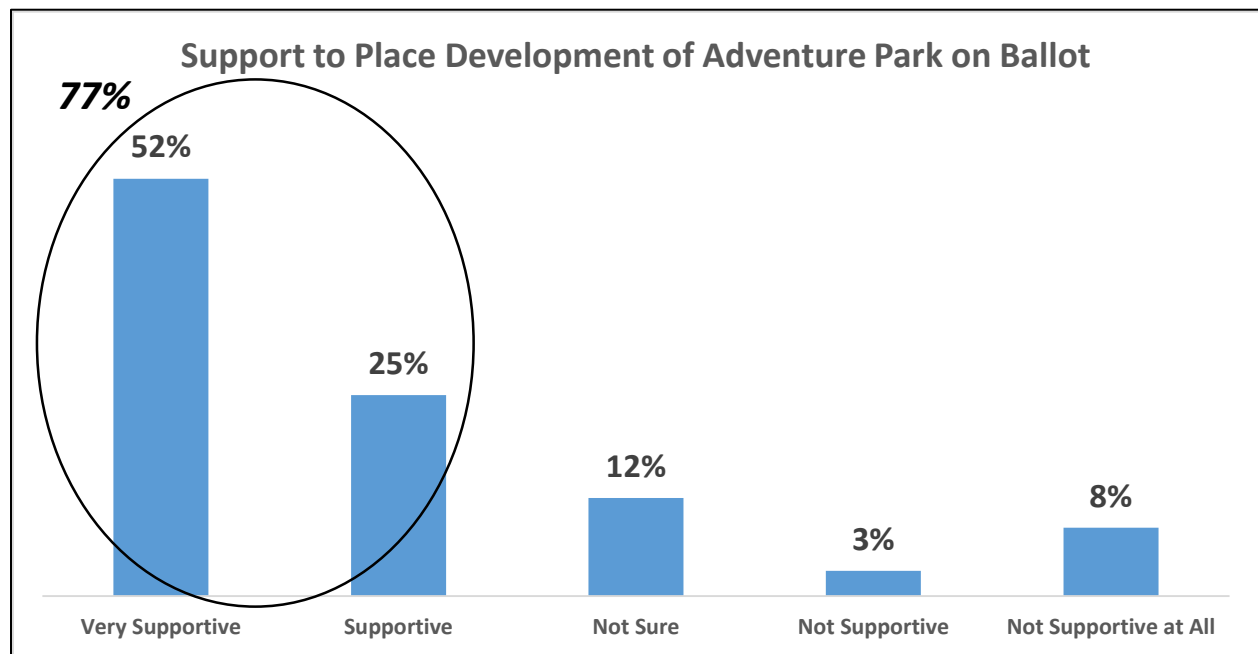
Seventy-four percent of respondents are very supportive or supportive of a nonprofit partnership to develop and operate an outdoor adventure park. Sixty-three percent of respondents were very supportive or supportive as well with partnering with private businesses to develop and operate an outdoor adventure park. Only about half of the respondents were very supportive or supportive with no partner (city management) to develop and operate the adventure park (**Figure 11**).



**Figure 11. Support for Partnerships**

IT IS EXPECTED THE ESTIMATED COSTS WILL EXCEED ONE MILLION DOLLARS IN CITY GENERAL FUNDS TO DEVELOP THE OUTDOOR ADVENTURE PARK. IN THAT CASE, HOW SUPPORTIVE WOULD YOU BE PLACING THE MEASURE ON THE BALLOT TO BE VOTED ON BY CITY OF CARLSBAD RESIDENTS? NOTE: SUPPORTING THIS BALLOT MEASURE WILL NOT RESULT IN ANY TAX INCREASE.

Seventy-seven percent of respondents are very supportive or supportive of placing the outdoor adventure park development on the ballot to be voted on by City of Carlsbad residents. Only 11 percent of respondents were not supportive or not supportive at all for placing this measure on the ballot (**Figure 12**).



**Figure 12. Support to Place the Measure on Ballot**

## DEMOGRAPHICS

Counting yourself, how many people in your household are:							
Age Segments	0	1	2	3	4	5	5+
Under age 5	46.35%	35.11%	16.57%	0.84%	0.84%	0.28%	0.00%
Ages 5-9	33.33%	43.95%	21.73%	0.99%	0.00%	0.00%	0.00%
Ages 10-14	33.60%	44.88%	20.47%	1.05%	0.00%	0.00%	0.00%
Ages 15-19	40.26%	45.05%	12.78%	1.92%	0.00%	0.00%	0.00%
Ages 20-24	58.41%	34.96%	5.75%	0.88%	0.00%	0.00%	0.00%
Ages 25-34	42.65%	29.39%	26.16%	1.43%	0.00%	0.36%	0.00%
Ages 35-44	22.66%	32.24%	44.66%	0.44%	0.00%	0.00%	0.00%
Ages 45-54	21.25%	35.33%	43.19%	0.23%	0.00%	0.00%	0.00%
Ages 55-64	27.25%	37.97%	34.20%	0.00%	0.00%	0.00%	0.58%
Ages 65-74	38.04%	32.97%	28.99%	0.00%	0.00%	0.00%	0.00%
Ages 75+	74.12%	19.41%	6.47%	0.00%	0.00%	0.00%	0.00%

Figure 13. Survey Respondents' Household Size by Age Segment

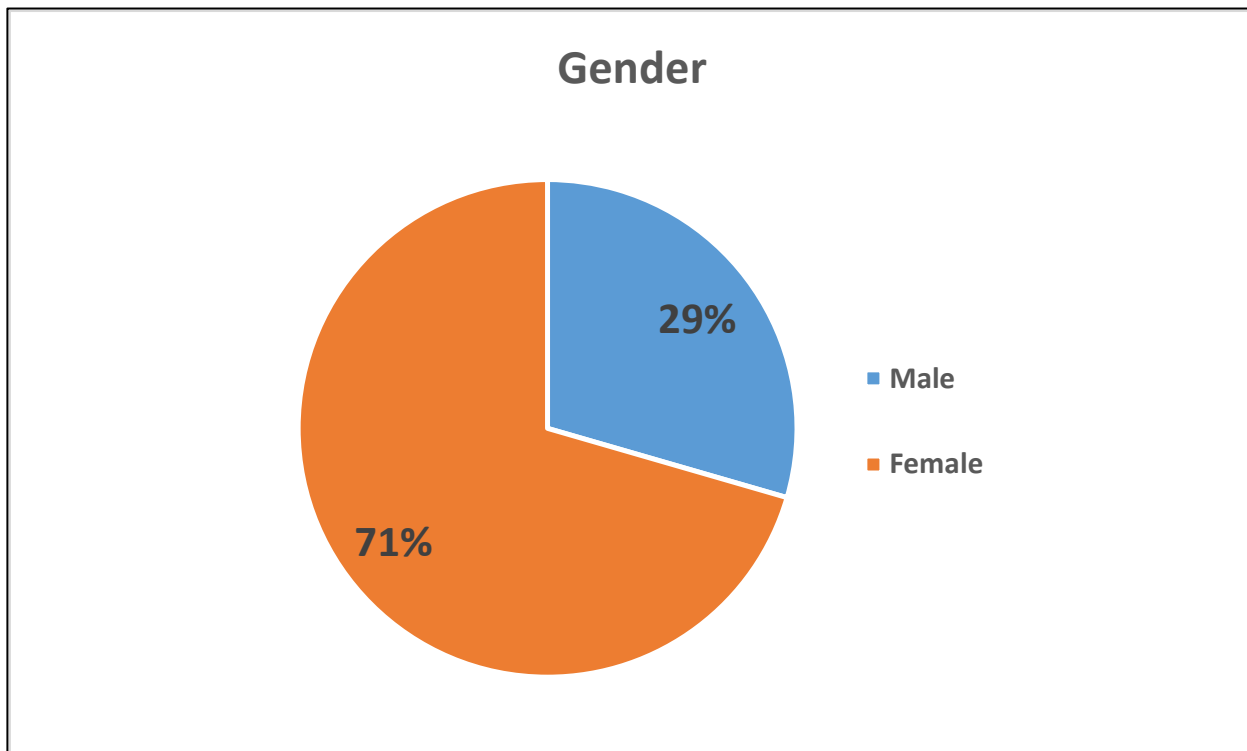


Figure 14. Survey Respondents' Gender Ratio



## 2.4 STATISTICALLY RELIABLE SURVEY

ETC Institute partnered with PROS consulting and the City of Carlsbad Parks & Recreation Department to conduct a community recreation feasibility survey to determine the feasibility of constructing and potentially partnering for the operation of a proposed outdoor adventure park.

In 2013 Carlsbad City Council accepted the needs assessment and comprehensive action plan (master plan). The master plan includes a strategic action plan that serves as a guide for the department's priority development, capital improvement project planning, and park, facility and amenity development for a five-year period. The two projects that were tested on the survey were derived from the planning process and developed based on extensive community input and values, leadership vision and future trends.

### 2.4.1 METHODOLOGY

The survey was designed to accomplish two objectives, ensure the results would be statistically reliable and maximize community input.

- **Statistically reliable random sample**

To obtain a statistically reliable sample, ETC Institute selected a random sample of 2,500 households for the survey. The sample was address-based, and the households were selected at random from all known residential addresses in the City of Carlsbad. This method ensured that each city household had an equal probability of being selected for the survey. Survey packets were then mailed to each of the 2,500 households selected for the random sample. The survey packets contained a cover letter, a copy of the survey, and a postage-paid, return envelope.

A few days after the surveys were mailed; ETC Institute sent emails and placed phone calls to households in the random sample to encourage participation. The emails contained a link to the online version of the survey to make it easy for residents to complete the survey. To prevent responses from people who were not part of the random sample from being blended to those who were selected for the random sample; everyone who completed the survey online was required to enter their home address prior to submitting the survey. ETC Institute matched the addresses that were entered online with the addresses that were originally selected for the random sample.

If the address from a survey completed online did not match one of the addresses selected for the random sample, the online survey was not counted as part of the random sample. A total of 502 residents from the random sample completed the survey. Of these, 344 were completed by mail, 136 were completed online, and 22 were completed by phone. The results for the random sample of 502 households have a 95 percent level of confidence with a precision rate of at least +/- 4.4 percent.

- **Non random sample**

To maximize community input, ETC Institute created a website for the survey that was open to all community residents. This unscientific, non-random sample, allowed anyone in the community to share their opinions with the City. A total of 215 residents from the non-random sample completed the survey online.

## 2.4.2 SURVEY FINDINGS

### OUTDOOR ADVENTURE PARK

#### Use of Potential Features

Respondents were asked to select from a list of 17 potential features which ones their household would use if developed at an outdoor adventure park. Seventy-eight percent of households indicated they would use the exercise path. Other features include: outdoor fitness course (61 percent), zip-line (45 percent), rock climbing wall (42 percent), mountain bike trails (39 percent), and obstacle course (34 percent).

- More than 50 percent of households with children and household with adults ages 20-54 and no children indicated they would use the zip-line and the rock climbing wall. Only 16 percent or less of household's ages 55 and older indicated use therefore significantly lowering the average.

#### Potential Features Households Would Be Most Likely to Use

Based on the sum of respondents' top four choices, 66 percent indicated they would most likely use the exercise path. Other features include: outdoor fitness course (47 percent), zip-line (27 percent), mountain bike trails (24 percent), and rock climbing wall (24 percent).

#### Potential Visitation

Ninety-four percent of households indicated some level of usage of the outdoor adventure park. Fifty-two percent of respondents indicated they would use the facility once a week or more.

### Q9. How Often Households Would Visit the Outdoor Adventure Park

by percentage of respondents (excluding don't know)



Source: ETC Institute (2016)

Figure 15. Potential Visitation

### Preferred Way of Paying Fees to Use the Outdoor Adventure Park

Sixty-nine percent of respondents were either willing to pay per visit (45 percent) or by monthly auto-debit (24 percent). Twenty-eight percent (28 percent) indicated they were not willing to pay to use the adventure park (**Figure 16**).

Households in every income bracket who were willing to pay to use the outdoor adventure activity park most preferred to pay per visit.

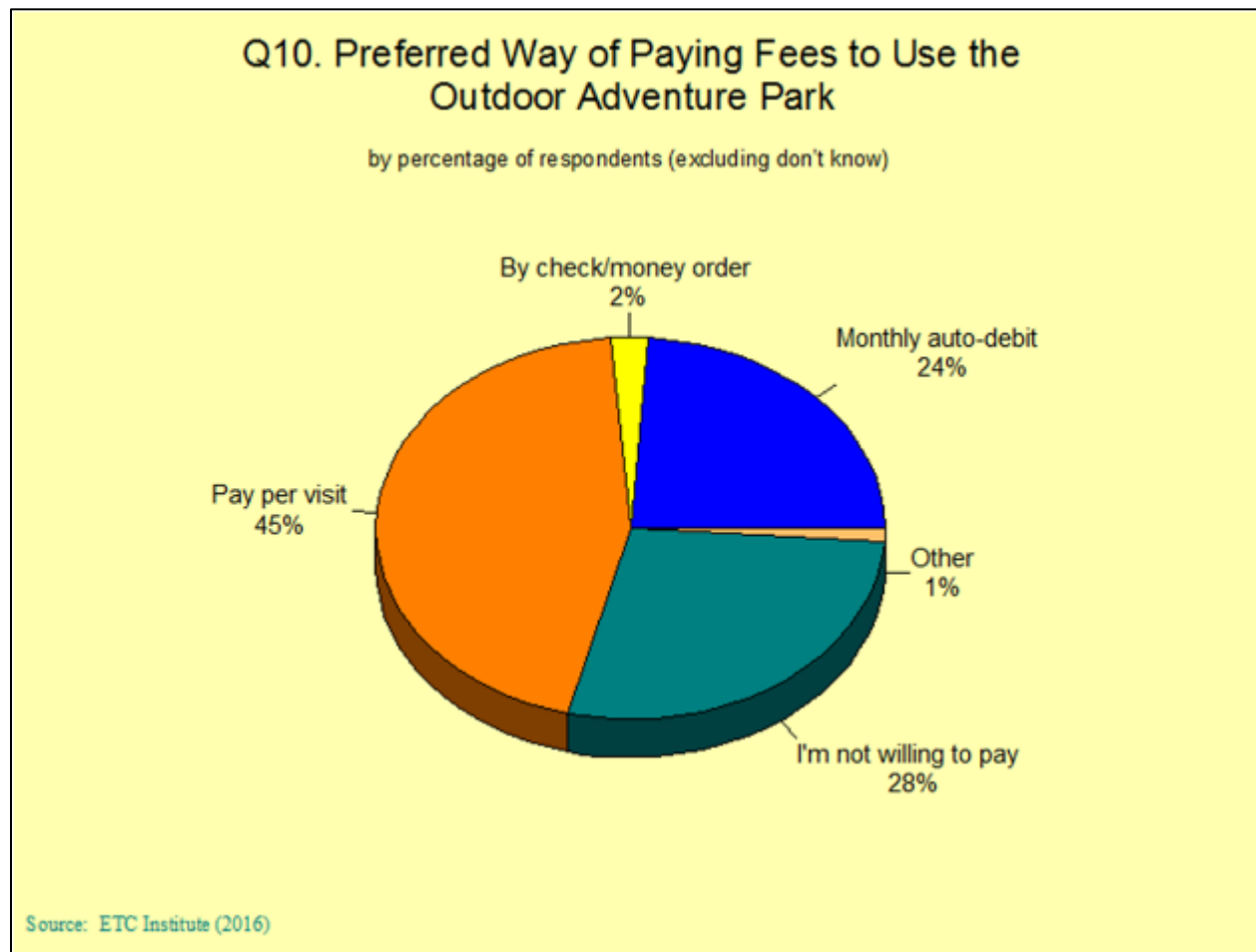


Figure 16. Preferred Way of Paying Fees

## PARTNERSHIPS

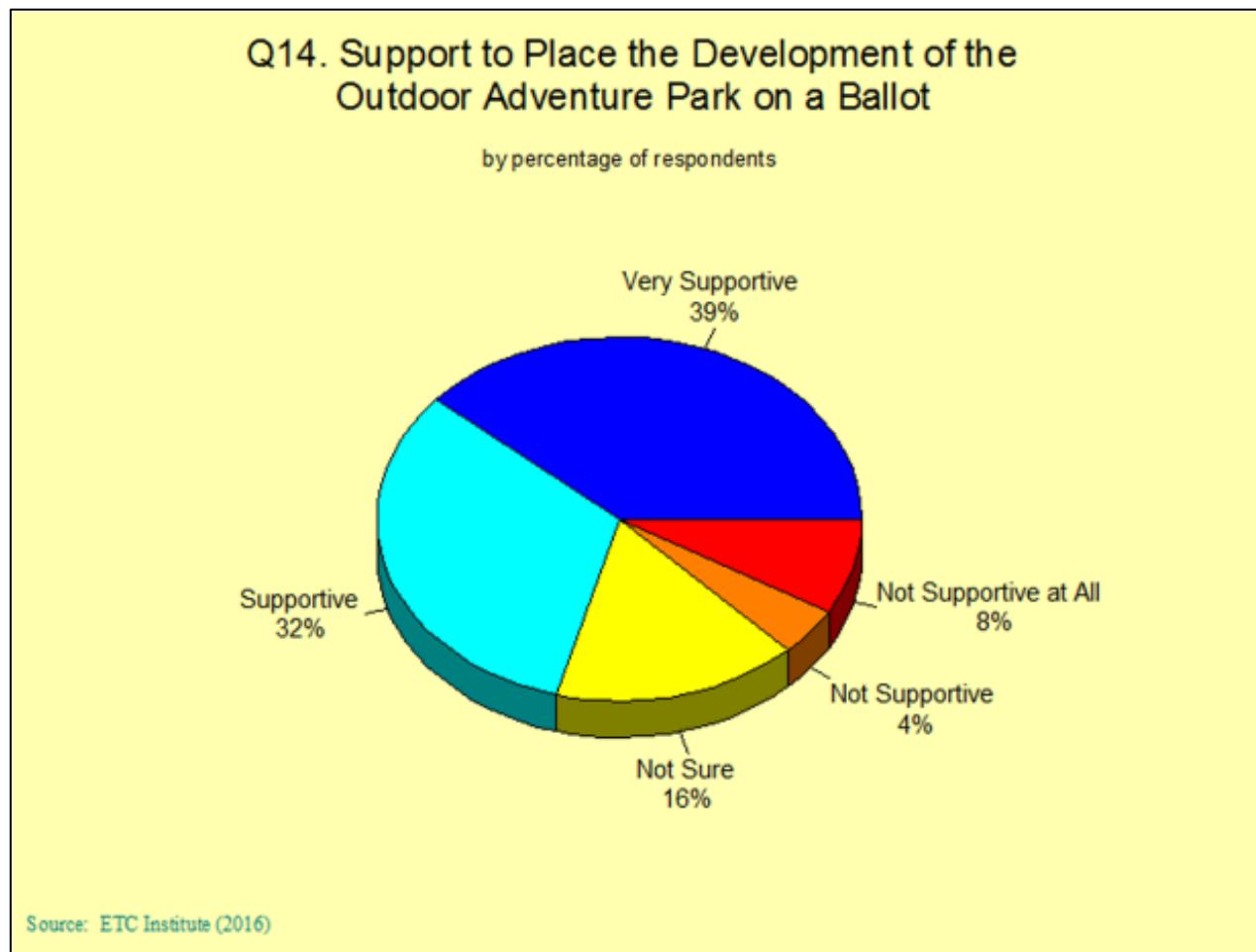
### Support for Partnerships to Develop and Operate the Outdoor Adventure Park:

Based on the sum of respondents who were either very supportive or supportive, 63 percent support for the city to partner with nonprofits. Other similar levels of support include: no partner (city managed) (48 percent) and partner with private businesses (43 percent).

## FUNDING

### Support to Place Development of Outdoor Adventure Park on Ballot

Seventy-one percent indicated they were either very supportive (39 percent) or supportive (32 percent) of putting the measure on the ballot. Sixteen percent were not sure and 12 percent were not supportive (Figure 17).



**Figure 17. Support to Place the Measure on a Ballot**



## CHAPTER THREE – MARKET ANALYSIS

### 3.1 DEMOGRAPHIC ANALYSIS

The demographic analysis provides an understanding of the population within the City of Carlsbad. This analysis is reflective of the total population, and its key characteristics such as age segments, income levels, race, and ethnicity.

Future projections are based on historical patterns, and unforeseen circumstances during or after the time of the projections could have a significant bearing on the validity of the final projections.

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#### 3.1.1 DEMOGRAPHIC OVERVIEW

The total city population has experienced an increase of approximately 4.51 percent; from 105,328 in 2010 to 110,081 in 2015. The current estimated population is projected to continue its rapid growth, increasing to 115,622 individuals in 2020, and 125,785 by 2030.

According to U.S. Census reports, the total number of households in the target area has experienced a coinciding upward trend, increasing roughly 3.94 percent, from 41,345 in 2010 to 42,976 in 2015. The city's total households are expected to continue to increase at this steady rate up to 48,788 households by 2030.

The City's median household income (\$90,603) and per capita income (\$47,554) are both well above the state and national averages.

Based on the 2010 Census, the target area population is just slightly higher (41.5 years) than the median age of the U.S. (37.2 years). Projections show that the service area will undergo an aging trend throughout 2030, as the 55+ age group grows to represent over 36 percent of the total population.

The estimated 2015 service area population is predominantly White alone (81.13 percent), with the Asian (7.76 percent) population representing the largest minority. Future projections show that by 2030 the overall composition of the population will become more diverse. Forecasts of the target area through 2030 expect decreases in the White alone (76.65 percent) population; coinciding with slight increases in the population for all other race segments.

### 3.1.2 METHODS

Demographic data used for the analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI). All data was acquired in Nov. 2015 and reflects actual numbers as reported in the 2010 Censuses, and estimates for 2015 and 2020 as obtained by ESRI. Straight-line linear regression was utilized for projected 2025 and 2030 demographics. Carlsbad's boundaries were utilized as the demographic analysis boundary shown below in **Figure 18**.

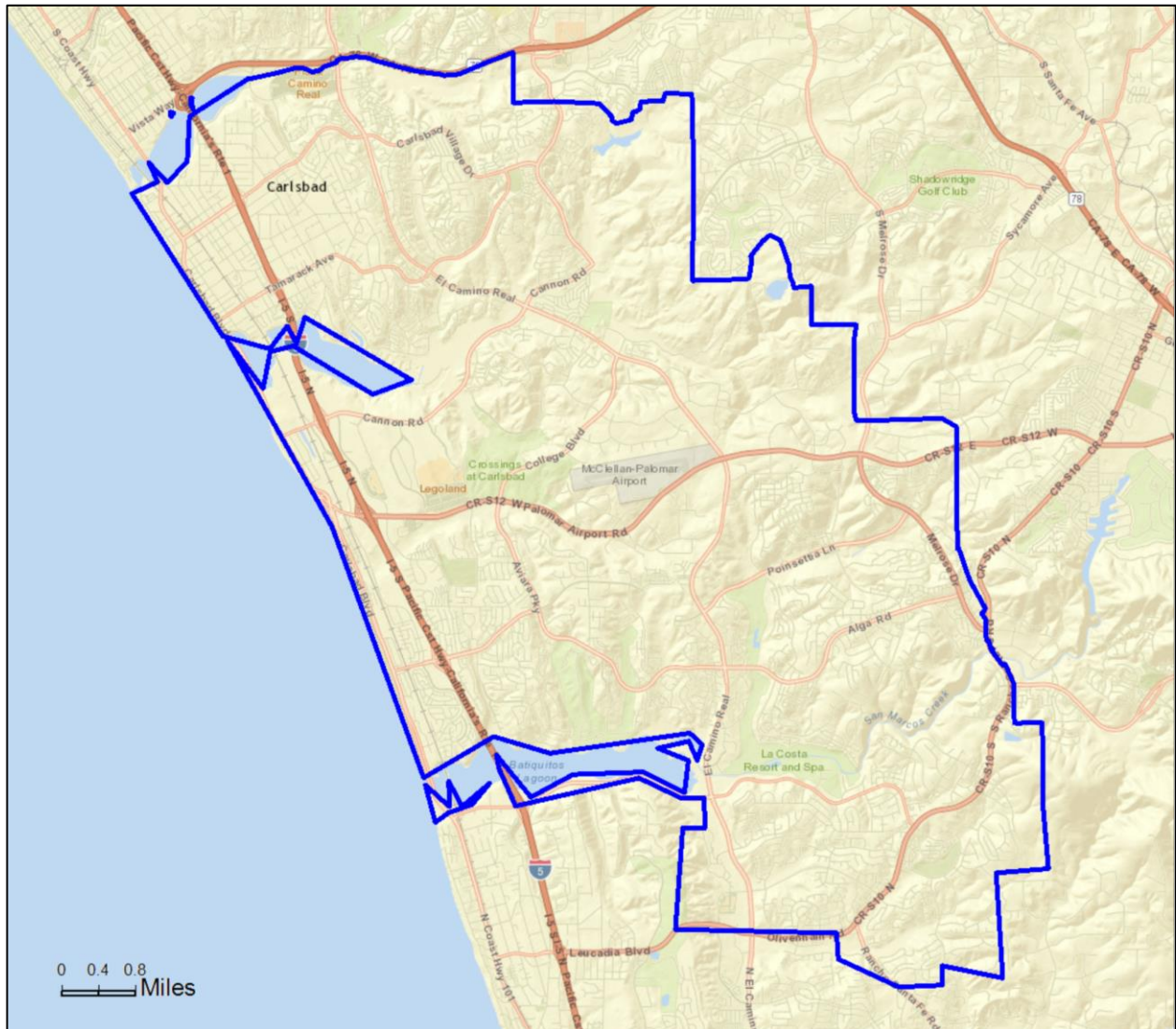


Figure 18. Carlsbad, California- City Limits

## RACE AND ETHNICITY DEFINITIONS

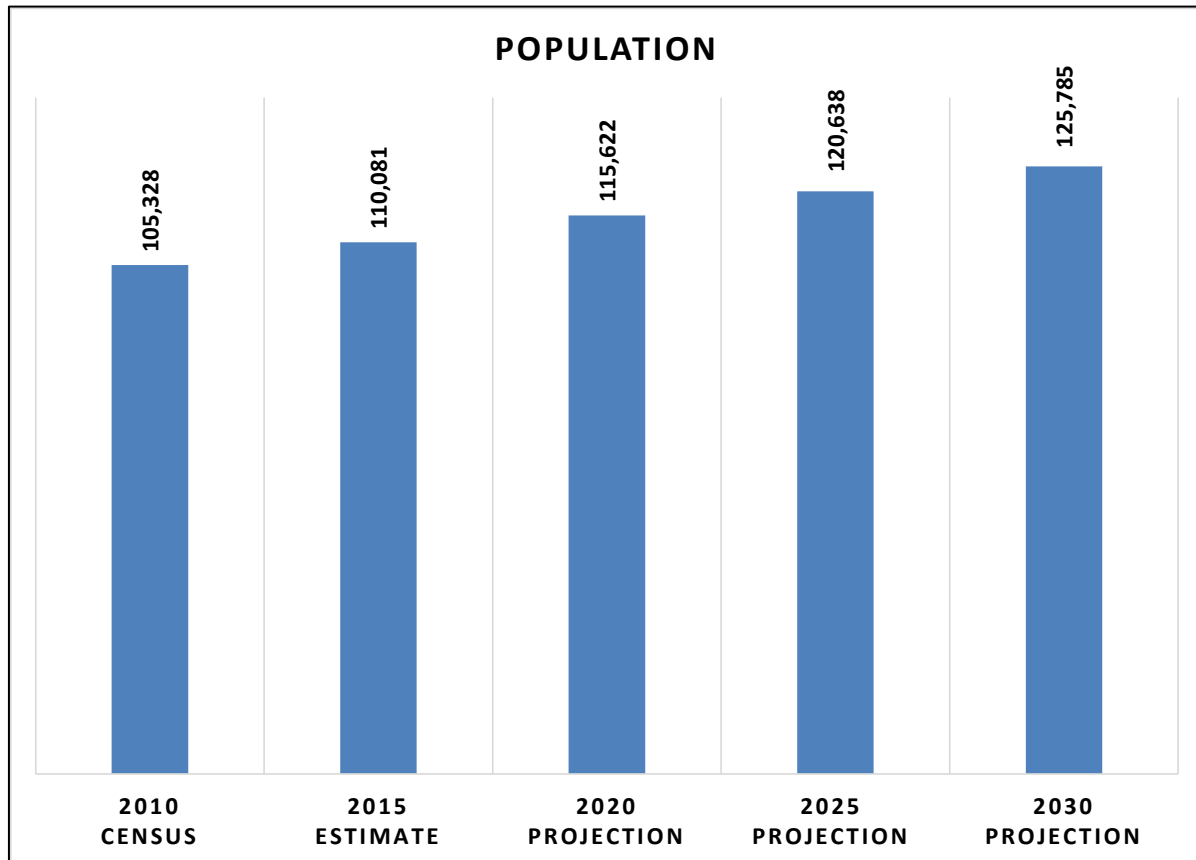
The minimum categories for data on race and ethnicity for Federal statistics, program administrative reporting, and civil rights compliance reporting are defined as below. The Census 2010 data on race are not directly comparable with data from the 2000 Census and earlier censuses; caution must be used when interpreting changes in the racial composition of the US population over time. The latest (Census 2010) definitions and nomenclature are used within this analysis.

- American Indian – This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- Asian – This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- Black – This includes a person having origins in any of the black racial groups of Africa
- Native Hawaiian or Other Pacific Islander – This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
- White – This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- Hispanic or Latino – This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race

### 3.1.3 CARLSBAD CITY POPULACE

#### POPULATION

The city's population has seen a growing trend and is currently estimated at 110,081 individuals. The total population is expected to continue to grow over the next 15 years. Based on predictions through 2030, the city is expected to have just below 125,800 residents living within 48,788 households (**Figure 19**).



**Figure 19. Total Population**

## AGE SEGMENT

Evaluating population by age segments, the service area exhibits a skewed distribution among the four major age segments; with the 35-54 and 55+ segments representing 58.4 percent of the City's total population. Currently, the City has a predominately aging population, with the average age of its residents being 41.5 years old.

The overall population composition is projected to undergo an aging trend. While the younger three age segments are expected to experience decreases or minimal increases in population percentage; the 55+ age segment is projected to continue increasing an additional 7.1 percent over the next 15 years. This is assumed to be a consequence of a vast amount of the Baby Boomer generation shifting into the senior age segment (**Figure 20**).

The Parks & Recreation Department currently offers a wide variety of programs; primarily focusing on the preschooler, teen, and adult 50+ segments. Moving forward, the department might want to consider separating its adult 50+ segment into multiple segments. Given the differences in how active adults (55+) participate in recreation programs, the trend is moving toward having at least two different segments of older adults. The department could evaluate further splitting program offerings into 55–74 and 75 plus program segments.

With Carlsbad's population expected to continue to age over the next 15 years, this would be a great time for the department to consider taking this step.

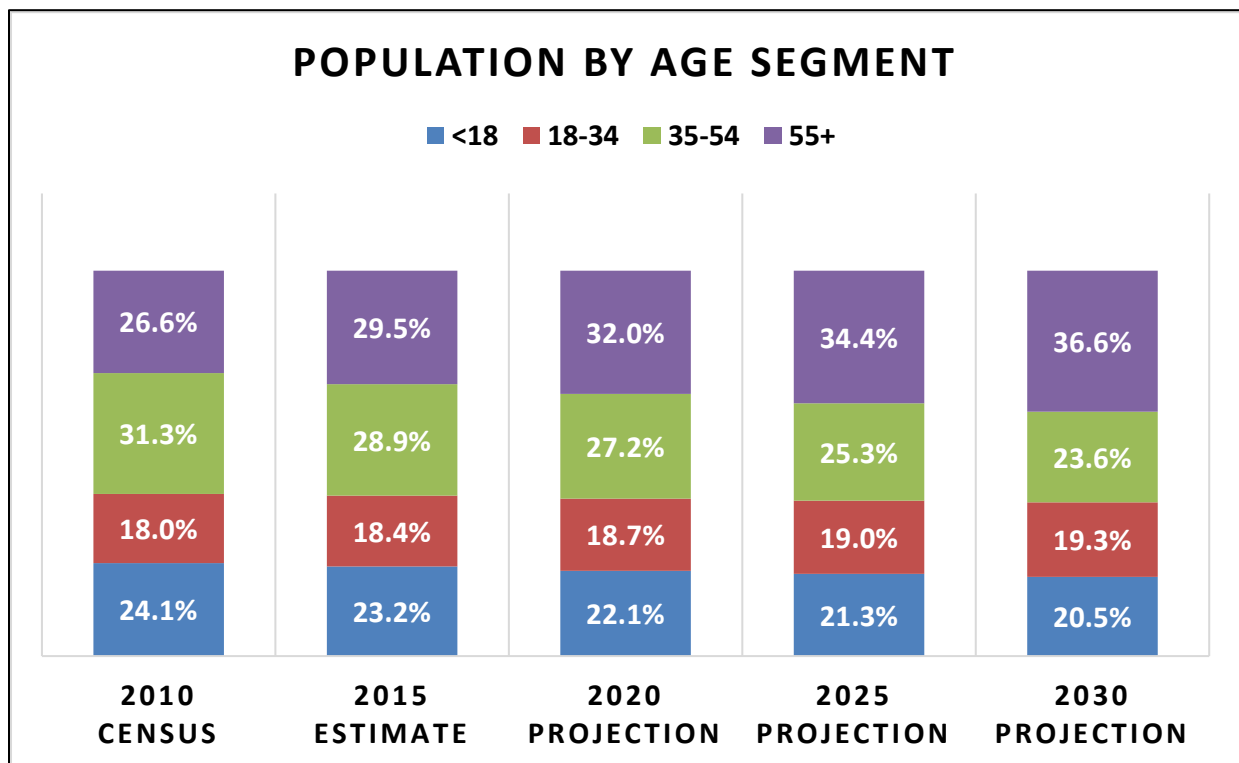
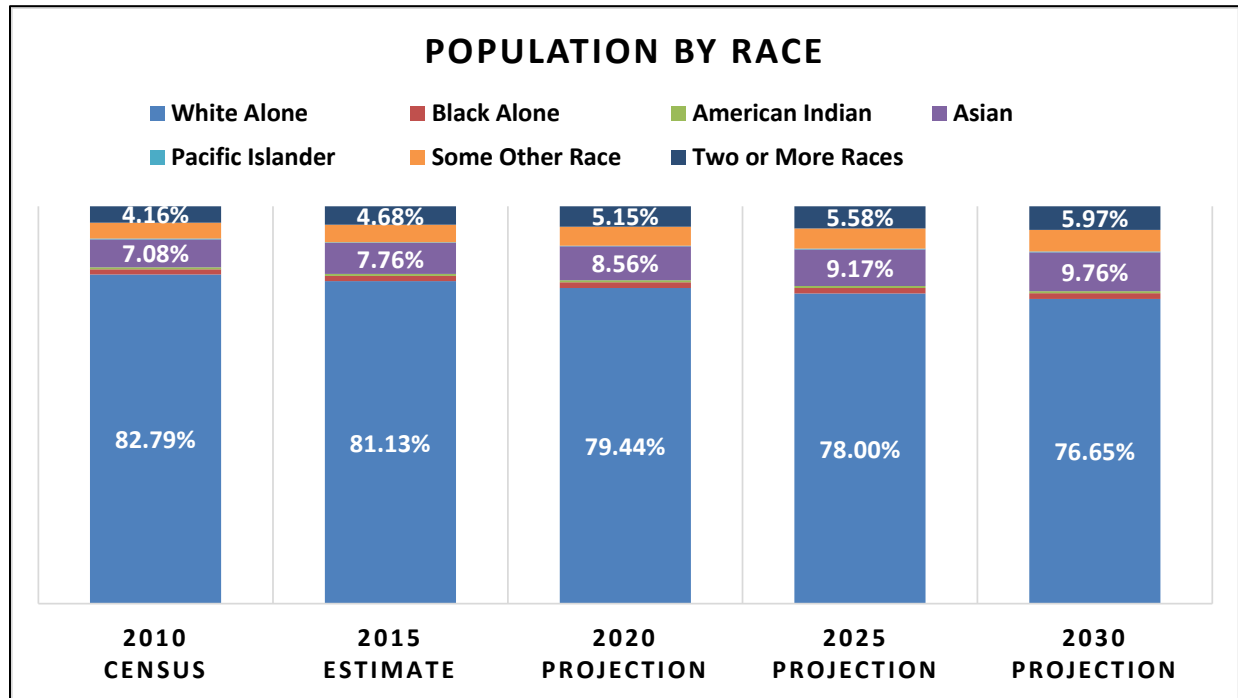


Figure 20. Population Age by Segments

## RACE AND ETHNICITY

Carlsbad's current population is predominately White alone. The 2015 estimate shows that 81.13 percent of the population falls into the White alone category, while the Asian category (7.76 percent) represents the largest minority. The predictions for 2030 expect the population by race to become slightly more diverse. There is expected to be a decrease in the White alone category; accompanied by slight increases in population of all other races (**Figure 21**).



**Figure 21. Population by Race**

## HOUSEHOLDS AND INCOME

The City's median household income (\$90,603) and per capita income (\$47,554) are both well above the state and national averages (**Figure 22**).

With the household income being above the national average, this indicates the presence of disposable income. Carlsbad residents will be more likely to desire best in class facilities and be willing to pay for them compared to the average United States citizen.

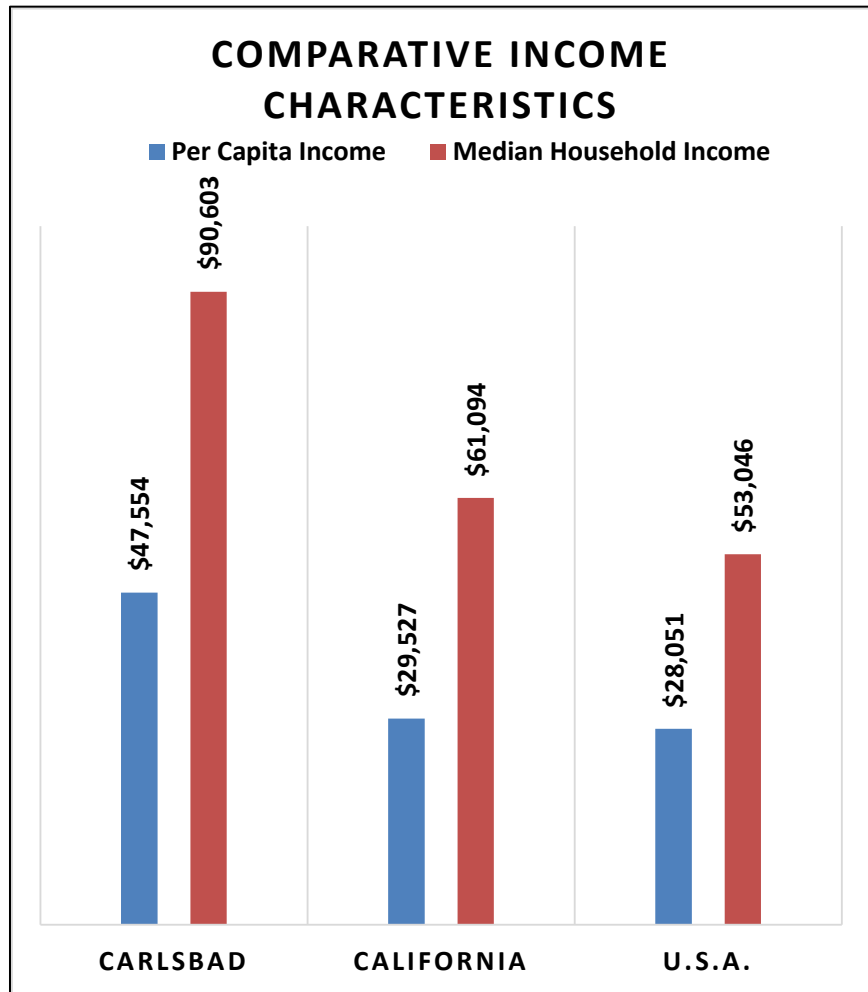


Figure 22. Comparative Income Characteristics



### 3.2 TRENDS ANALYSIS

The following tables summarize the findings from the Sports & Fitness Industry Association's (SFIA) 2015 Sports, Fitness and Leisure Activities Topline Participation Report, as well as the local market potential index data, which compares the demand for recreational activities and spending of residents for the targeted area to the national averages.

Summary of National Participatory Trends Analysis	
<b>1. Number of "inactives" decreased slightly, those 'active to a healthy level' on the rise</b>	<ul style="list-style-type: none"> <li>a. "Inactives" up 3% in 2014, from 80.2 million to 82.7 million</li> <li>b. Approximately one-third of Americans (ages 6+) are active to a healthy level</li> </ul>
<b>2. Most popular sport and recreational activities</b>	<ul style="list-style-type: none"> <li>a. Fitness walking (112.6 million)</li> <li>b. Running/jogging (51.1 million)</li> <li>c. Treadmill (50.2 million)</li> </ul>
<b>3. Activities most rapidly growing over last five years</b>	<ul style="list-style-type: none"> <li>a. Adventure racing – up 136%</li> <li>b. Non-traditional/off-road triathlon – up 123%</li> <li>c. Squash – up 101%</li> <li>d. Traditional/road triathlon – up 92%</li> <li>e. Rugby – up 77%</li> </ul>
<b>4. Activities most rapidly declining over last five years</b>	<ul style="list-style-type: none"> <li>a. Wrestling – down 40%</li> <li>b. Touch football – down 32%</li> <li>c. In-line roller skating – down 32%</li> <li>d. Racquetball – down 25%</li> <li>e. Slow-pitch softball – down 23%</li> </ul>

Summary of Local Market Potential Index Analysis	
<b>1. The service area exhibits above average market potential for sport and leisure activities</b>	
<b>2. Top recreational activities in Carlsbad compared to the national averages</b>	<ul style="list-style-type: none"> <li>a. Participated in skiing (downhill)</li> <li>b. Visited a museum</li> <li>c. Participated in yoga</li> </ul>

Information released by Sports & Fitness Industry Association's (SFIA) 2015 Study of Sports, Fitness, and Leisure Participation reveals that the most popular sport and recreational activities include: fitness walking, running/jogging, treadmill, free weights and road bicycling. Most of these activities appeal to both young and old alike, can be done in most environments, are enjoyed regardless of level of skill, and have minimal economic barriers to entry. These popular activities also have appeal because of the social aspect. For example, although fitness activities are mainly self-directed, people enjoy walking and biking with other individuals because it can offer a degree of camaraderie.

Fitness walking has remained the most popular activity of the past decade by a large margin, in terms of total participants. Walking participation during the latest year data was available (2014), reported over 112 million Americans had walked for fitness at least once.

In the past year, the estimated number of "inactives" in America has increased three percent, from 80.2 million in 2013 to 82.7 million in 2014. According to the Physical Activity Council, an "inactive" is defined as an individual that doesn't take part in any active sport. Although inactivity was up in 2014, the 209 million "actives" seem to be participating more often and in multiple activities.

*The Sports & Fitness Industry Association (SFIA) Sports, Fitness & Recreational Activities Topline Participation Report 2015* was utilized to evaluate national sport and fitness participatory trends. SFIA is the number one source for sport and fitness research. The study is based on online interviews carried out in Jan. and Feb. 2015 from nearly 11,000 individuals and households.

### 3.2.1 NATIONAL TRENDS IN GENERAL FITNESS

National participatory fitness trends have experienced strong growth. Many of these activities have become popular due to an interest in improving health by engaging in an active lifestyle. These activities also have very few barriers to entry, which provides a variety of activities that are relatively inexpensive to participate in and can be performed by nearly anyone with no time restrictions.

The most popular fitness activity by far is fitness walking, which had over 112.5 million participants in 2014. Other leading fitness activities based on number of participants include running/jogging (51 million), treadmill (50 million), hand weights (42 million), and weight/resistant machines (36 million).

Over the last five years, the activities that grew most rapidly were off-road triathlons (up 123 percent), road triathlons (up 92 percent), trail running (up 55 percent), high impact aerobics (55 percent increase), and yoga (up 33 percent). Most recently, from 2013-2014, the largest gains in participation were high impact aerobics (14 percent increase), trail running (up 11 percent), and barre (up ten percent) (**Figure 23**).

National Participatory Trends - General Fitness					
Activity	Participation Levels			% Change	
	2009	2013	2014	13-14	09-14
Fitness Walking	110,882	117,351	112,583	-4.1%	1.5%
Running/Jogging	42,511	54,188	51,127	-5.6%	20.3%
Treadmill	50,395	48,166	50,241	4.3%	-0.3%
Free Weights (Hand Weights)	N/A	43,164	41,670	-3.5%	N/A
Weight/Resistant Machines	39,075	36,267	35,841	-1.2%	-8.3%
Stationary Cycling (Recumbent/Upright)	36,215	35,247	35,693	1.3%	-1.4%
Stretching	36,299	36,202	35,624	-1.6%	-1.9%
Free Weights (Dumbbells)	N/A	32,209	30,767	-4.5%	N/A
Elliptical Motion Trainer	25,903	27,119	28,025	3.3%	8.2%
Free Weights (Barbells)	26,595	25,641	25,623	-0.1%	-3.7%
Yoga	18,934	24,310	25,262	3.9%	33.4%
Calisthenics/Bodyweight Exercise	N/A	N/A	22,390	N/A	N/A
Aerobics (High Impact)	12,771	17,323	19,746	14.0%	54.6%
Stair Climbing Machine	13,653	12,642	13,216	4.5%	-3.2%
Pilates Training	8,770	8,069	8,504	5.4%	-3.0%
Stationary Cycling (Group)	6,762	8,309	8,449	1.7%	24.9%
Trail Running	4,845	6,792	7,531	10.9%	55.4%
Cross-Training	N/A	6,911	6,774	-2.0%	N/A
Cardio Kickboxing	5,500	6,311	6,747	6.9%	22.7%
Martial Arts	6,643	5,314	5,364	0.9%	-19.3%
Boxing for Fitness	N/A	5,251	5,113	-2.6%	N/A
Tai Chi	3,315	3,469	3,446	-0.7%	4.0%
Barre	N/A	2,901	3,200	10.3%	N/A
Triathlon (Traditional/Road)	1,148	2,262	2,203	-2.6%	91.9%
Triathlon (Non-Traditional/Off Road)	634	1,390	1,411	1.5%	122.6%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
<b>Legend:</b> <div> <div>Large Increase (greater than 25%)</div> <div>Moderate Increase (0% to 25%)</div> <div>Moderate Decrease (0% to -25%)</div> <div>Large Decrease (less than -25%)</div> </div>					

**Figure 23. General Fitness National Participatory Trends**

### 3.2.2 NATIONAL TRENDS IN OUTDOOR RECREATION

Results from the SFIA's *Topline Participation Report* demonstrate increased popularity among Americans in numerous outdoor recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or with a group, and are not limited by time restraints.

From 2009-2014, outdoor recreation activities that have undergone large increases are adventure racing (up 136 percent), archery (up 33 percent), backpacking overnight (up 30 percent), and BMX bicycling (up 27 percent). Over the same time frame, activities declining most rapidly were in-line roller skating (down 32 percent), camping within a quarter mile of home or vehicle (down 16 percent), and recreational vehicle camping (down 14 percent) (**Figure 24**).

National Participatory Trends - Outdoor Recreation					
Activity	Participation Levels			% Change	
	2009	2013	2014	13-14	09-14
Bicycling (Road)	39,127	40,888	39,725	-2.8%	1.5%
Fishing (Freshwater)	40,646	37,796	37,821	0.1%	-7.0%
Hiking (Day)	32,542	34,378	36,222	5.4%	11.3%
Camping (< 1/4 Mile of Vehicle/Home)	34,012	29,269	28,660	-2.1%	-15.7%
Wildlife Viewing (>1/4 Mile of Home/Vehicle)	22,702	21,359	21,110	-1.2%	-7.0%
Camping (Recreational Vehicle)	16,977	14,556	14,633	0.5%	-13.8%
Birdwatching (>1/4 mile of Vehicle/Home)	13,847	14,152	13,179	-6.9%	-4.8%
Fishing (Saltwater)	13,054	11,790	11,817	0.2%	-9.5%
Backpacking Overnight	7,757	9,069	10,101	11.4%	30.2%
Archery	6,368	7,647	8,435	10.3%	32.5%
Bicycling (Mountain)	7,367	8,542	8,044	-5.8%	9.2%
Hunting (Shotgun)	8,611	7,894	7,894	0.0%	-8.3%
Skateboarding	7,580	6,350	6,582	3.7%	-13.2%
Roller Skating, In-Line	8,942	6,129	6,061	-1.1%	-32.2%
Fishing (Fly)	5,755	5,878	5,842	-0.6%	1.5%
Climbing (Sport/Indoor/Boulder)	4,541	4,745	4,536	-4.4%	-0.1%
Climbing (Traditional/Ice/Mountaineering)	2,062	2,319	2,457	6.0%	19.2%
Adventure Racing	1,005	2,095	2,368	13.0%	135.6%
Bicycling (BMX)	1,858	2,168	2,350	8.4%	26.5%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

**Figure 24. Outdoor Recreation Participatory Trends**

### 3.2.3 LOCAL SPORT AND MARKET POTENTIAL

The following charts show sport and leisure market potential data from ESRI. A Market Potential Data (MPI) measures the probable demand for a product or service in Carlsbad. The MPI shows the likelihood that an adult resident of the target area will participate in certain activities when compared to the US National average. The national average is 100, therefore numbers below 100 would represent a lower than average participation rate, and numbers above 100 would represent higher than average participation rate. The service area is compared to the national average in four categories – general sports, fitness, outdoor activity, and money spent on miscellaneous recreation.

Overall, the City of Carlsbad demonstrates above average market potential index (MPI) numbers; this is particularly noticeable in the fitness and outdoor activity market potential tables. All of the activities in both of these categories have above average MPI scores (100+). These overall high MPI scores show that Carlsbad's residents have a rather strong participation presence. This becomes significant when the Parks & Recreation Department considers hosting special events or starting up new programs; giving them a strong tool to estimate resident attendance.

As seen in the tables below, the following outdoor activities and leisure trends are most prevalent for Carlsbad residents. The activities are listed in descending order, from highest to lowest number of estimated participants among residents.

High index numbers (100+) are significant because they demonstrate that there is a greater potential that residents of the service area will actively participate in programs offered by the Parks & Recreation Department.

#### FITNESS MARKET POTENTIAL

Local Participatory Trends - Fitness				
Activity	Estimated Participants	% of Population		MPI
		Carlsbad	USA	
Walking for exercise	28,727	34.0%	28.1%	<b>121</b>
Swimming	16,825	19.9%	15.8%	<b>126</b>
Jogging/running	15,247	18.0%	12.7%	<b>142</b>
Weight lifting	11,970	14.2%	10.7%	<b>133</b>
Aerobics	9,932	11.8%	8.9%	<b>132</b>
Yoga	9,255	11.0%	7.2%	<b>153</b>
Pilates	3,165	3.7%	2.8%	<b>134</b>

Figure 25. City of Carlsbad MPI (Fitness)

## OUTDOOR ACTIVITY MARKET POTENTIAL

Local Participatory Trends - Outdoor Activity				
Activity	Estimated Participants	% of Population		MPI
		Carlsbad	USA	
Hiking	12,567	14.9%	10.0%	<b>149</b>
Bicycling (road)	11,162	13.2%	9.9%	<b>134</b>
Went overnight camping	11,107	13.1%	12.7%	<b>103</b>
Canoeing/kayaking	5,460	6.5%	5.4%	<b>120</b>
Boating (power)	4,814	5.7%	5.3%	<b>108</b>
Bicycling (mountain)	4,542	5.4%	4.0%	<b>134</b>
Fishing (salt water)	3,431	4.1%	4.1%	<b>101</b>
Backpacking	3,087	3.7%	3.0%	<b>125</b>
Horseback riding	2,104	2.5%	2.5%	<b>102</b>

Figure 26. City of Carlsbad MPI (Outdoor Activity)

## MONEY SPENT ON MISCELLANEOUS RECREATION

Local Participatory Trends -Money Spent on Recreation				
Activity	Estimated Participants	% of Population		MPI
		Carlsbad	USA	
Attended sports event	25,070	29.7%	23.6%	<b>126</b>
Visited a theme park	19,504	23.1%	18.0%	<b>128</b>
Visited a Museum	17,267	20.4%	12.9%	<b>158</b>
Visited a zoo	12,447	14.7%	11.8%	<b>125</b>
Attended baseball game - MLB reg seas	12,171	14.4%	9.6%	<b>150</b>
Spent \$250+ on sports/rec equip	7,438	8.8%	7.0%	<b>126</b>
Spent \$100-249 on sports/rec equip	6,659	7.9%	6.5%	<b>121</b>
Attended football game (college)	6,239	7.4%	5.6%	<b>131</b>
Attended football game - NFL weekend	5,425	6.4%	4.6%	<b>138</b>
Spent \$1-99 on sports/rec equip	5,330	6.3%	5.9%	<b>106</b>
Attended high school sports	3,782	4.5%	4.6%	<b>97</b>
Attended basketball game - NBA reg seas	3,708	4.4%	3.2%	<b>139</b>
Attended ice hockey - NHL reg seas	3,560	4.2%	2.8%	<b>151</b>
Attended basketball game (college)	3,341	4.0%	3.0%	<b>134</b>
Attended football game - NFL Mon/Thurs	3,067	3.6%	2.6%	<b>140</b>
Visited indoor water park	2,802	3.3%	3.1%	<b>106</b>

Figure 27. City of Carlsbad MPI (Recreation Expenditures)

### 3.3 SIMILAR PROVIDER ANALYSIS

Based on input from city staff and the consultant's operational experience, it was determined that a drive time of 15, 35 and 50 minutes or less would be considered as a primary target audience for the proposed outdoor adventure park. Amenities were identified to be potential comparable providers to the outdoor adventure park within a 15, 35, and 50 minute drive time. Activities looked at in this similar provider analysis were zip lines, trampoline parks, paintball, BMX facilities, rock climbing, archery, outdoor obstacle course and disk golf facilities.

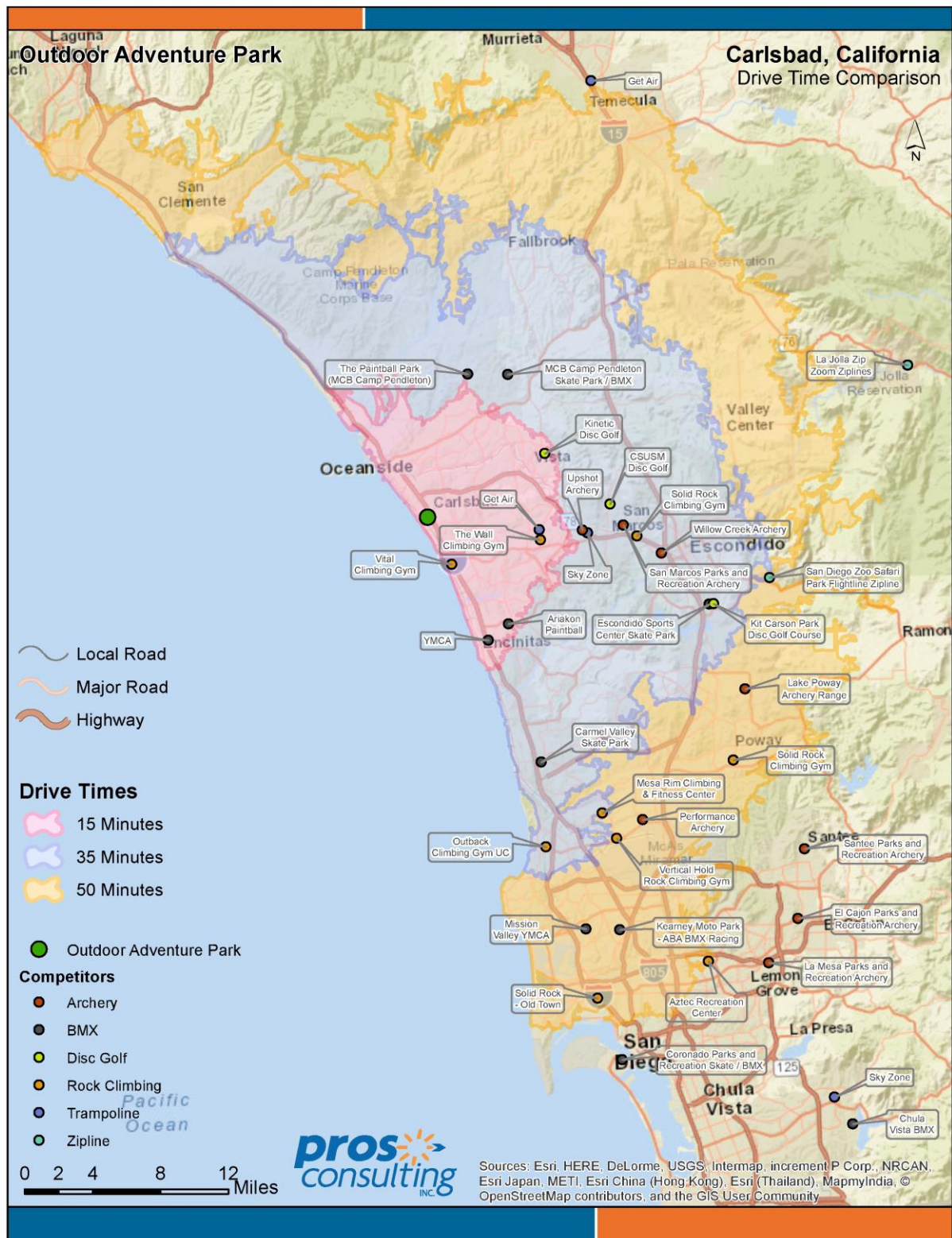
The comparison of similar providers reveals that there are very few competitors within a 35 minute drive time, indicating the opportunity for Carlsbad to serve to serve an unmet community need for an outdoor adventure park.



Activity	Name of Business	Less Than 15 Minutes Away	Less Than 35 Minutes Away	Less than 50 Minutes Away
<b>ZipLine</b>	Skull Canyon ZipLine			Corona
	San Diego Safari Park Flightline Zipline			San Diego
	La Jolla Zip Zoom Line			La Jolla
<b>Trampoline Parks</b>	Get Air	Vista		
	Get Air			Temecula
	Sky Zone		San Marcos	
	Sky Zone			San Diego
<b>Paintball</b>	Ariakin PaintBall	Carlsbad		
	The Paintball Park (MCB Camp Pendleton)		Oceanside	
<b>BMX</b>	ABX BMX Racing			San Diego
	Chula Vista BMX			Chula Vista
	YMCA			Mission Valley
	YMCA	Encinitas		
	City of Carmel Valley Parks and Recreation Skate/BMX		Carmel Valley	
	City of Escondido Parks and Recreation Skate/BMX			Escondido
	City of Coronado Parks and Recreation Skate/BMX			Coronado
	MCB Camp Pendleton Skate Park/BMX		Oceanside	
<b>Rock Climbing</b>	Vital Climbing Gym	Carlsbad		
	The Wall Climbing Gym	Vista		
	Solid Rock Climbing Gym		San Marcos	
	Solid Rock Climbing Gym			Poway
	Vertical Hold Rock Climbing Gym			San Diego
	Aztec Recreation Center			San Diego
	Mesa Rim Climbing Center			San Diego
	Outback Climbing Gym UC			San Diego
	Solid Rock - Old Town			San Diego
<b>Archery</b>	Upshot Archery			Escondido
	Willow Creek Archery			Escondido
	Performance Archery			San Diego
	City of San Marcos Parks and Recreation		San Marcos	
	City of Poway Parks and Recreation			Poway
	City of La Mesa Parks and Recreation			La Mesa
	City of El Cajon Parks and Recreation			El Cajon
<b>Outdoor Obstacle Course (Including Teambuilding)</b>				Santee
	No service providers			
<b>Disk Golf</b>	Kinetic Disk Golf	Vista		
	CSUSM Disk Golf		San Marcos	
	City of Escondido Parks & Recreation Department - Kit			Escondido

Figure 28. Similar Providers

The drive time map depicts the variety of service providers within a 15 minute (in pink), a 35 minute (in blue), and 50 minute (in orange) driving distance (**Figure 29**).



**Figure 29. Drive Time Map of City of Carlsbad**

## CHAPTER FOUR RECOMMENDATION AND CONCLUSION

Based on community input, demographics and trends analysis, market and gap analysis and consultation with the city's community & economic development planners and staff, the consulting team arrived at the following conclusion and recommendations.

There is a community support and a market gap for an outdoor adventure park that can serve as a regional destination in the City of Carlsbad. However, for it to fulfill the vision of Big Idea #2 and function as a true regional draw, it requires a significant footprint. Based on the assessment, the existing space limitations, neighborhood impacts and environmental concerns on city-owned park site do not serve adequately to recommend Big Idea 2.

As for specific sites, Zone 5 Park lacks the total acreage to contain the desired adventure park amenities to attract a regional audience. Additionally, mitigating noise and use impacts to the community living in adjacent housing will be a challenge.

The developable portion of the future Veterans Park site is large enough to accommodate the regional outdoor adventure park concept; however, significant environmental constraints (noise, lighting and use impacts) exist surrounding the park, which would make developing and permitting an adventure park at that location undesirable and not recommended.

Neither Zone 5 nor the future Veterans Park site provide an opportunity to fulfill the intended vision of Big Idea 2 in serving community need to the greatest extent possible. However, given the popularity and expressed community need for outdoor adventure amenities, individual offerings may be considered in future park development as the opportunity arises.

## APPENDIX A - COMMUNITY ONLINE SURVEY

Below are the respondents' reasons on why they do not support to place the development of Adventure Park on the ballot: (comments below are verbatim from online survey responses, no corrections were made to the text).

- Too much liability and overhead
- Seems touristy, gimmicky, and full of novelty for tourists, not residents. Put the money towards improvements at existing parks (like adding shade sails) and to develop more trails and more passive use, free parks.
- Leave as open space
- These are decisions that the government is entrusted to make
- no pickleball courts
- I would rather city \$ be spent on an outdoor grassy picnic area/park that overlooks our ocean views or use \$ to build the trails at agua hedionda lagoon
- Again, didn't like the division it could make between the community.
- Won't use it
- I do not support a new outdoor adventure park in the City of Carlsbad.
- I dont think we need to totally overhaul the existing parks but rather improve them. I would prefer some more open air trails and paths.
- We have a lot of outdoor activity venues already available
- This is not needed in Carlsbad.
- Don't need it.
- The city just spent over half a million dollars for a special election. I'm not in the mood to vote for anything that will cost our city money right now.
- same as previous
- Same as answer 13a
- I do not foresee my family using the suggested improvements very much. The park could just as well be left as is.
- See previous
- Just have grass and trees and benches
- same as above
- Would prefer it to remain as natural open space.
- My family and I don't want any further park development in Carlsbad like these ideas
- Enough recreation in area already
- this type of project should be developed and managed by a corporation that specializes in this kind of facility
- Again it would be used mostly by non Carlsbad residents like the alga Norte
- I don't want more traffic and more people at nearby Poinsettia Park. Our neighborhoods are not equipped to be a high traffic "retail" space like this.
- Don't want increased traffic or crowds for this.
- Don't care about this!
- I'm not in favor of it.
- an outdoor,adventure park will have a negative impact on this nice quiet neighborhood.
- Preserve current outdoor areas
- The cost outweighs the benefits. I'd rather put money into the multigenerational center for Carlsbad residents and make that outstanding. An Adventure park will get old over time with the

same walls, ropes, or obstacles that it will take more money to update it to make it continuously appealing to the public.

- We don't need this kind of facility / development
- Because trails and open space are enough! No need to always be looking for ways to fill in open space with elaborate plans which enrich someone's pockets.
- Seems too touristy/gimmicky and prefer to see funds go to more trails and nature-based activities.
- Measure A divided the communist to. Take a time out before trying anything else.
- Due to the lack of more designated turf/ grass open space.
- Worded oddly. But I'm not in favor of the outdoor adventure park in general. I think it will get very little use and be a big liability for the City.
- citizens who would never use the facility could block others from using it.
- I do not support a Adventure Park in the City of Carlsbad.
- Do not support outdoor adventure park!
- Carlsbad city can afford it
- We do not need an outdoor adventure park. There is so much of that type of stuff and Carlsbad already with Legoland. We are in desperate need of something for teenagers to do other than swimming. We have two fitness centers for exercise weightlifting we have trails already. How about an ice hockey rink where there's ice skating and ice complex, bowling alley, billiard tables, something for teenagers.
- because we wouldnt use it
- Not interested in outdoor adventure park
- taxpayer cost related to election; is there truly a need to develop facility?
- The city has spent too much money on expensive parks which are located in the southern part of carlsbad. It should be considering all of its residents and scaling back the expense. It should also use the money already allocated to build the trails for the AH lagoon. It should scale back the project so it can be done within the \$5 million dollar allocation - which is already excessive!
- This seems totally unnecessary and not something that we (or many people we know) would use on a regular basis, especially if we have to pay for use. Regular parks are fine, less expensive, and more appropriate for more of our residents.
- They are others places the city need to improve like the old senior center in pine street
- After your behavior with the Caruso debacle, I do not trust anything you do.
- wouldn't use much or if all. won't bring up value of community
- Because of the conduct of the Mayor on Measure A
- Not What Carlsbad Residents Want/Need! You Are Out of Touch With City Needs. Stop Wasting Our Money! This Is Why We Need A Serious Change Of Leadership In Carlsbad!
- Stop sending money. Carlsbad already has outdoor activties to enjoy that are free.
- an adventure park is not needed
- Would be of little use for me
- We don't need this in Carlsbad
- This project would cost Carlsbad lots of money down the road. We have lots of nice facilities now that are not total utilizes. We missed the ball by a no vote on A that would have given us all those hiking trails at no cost to us!!!
- See other comments. Any new facility is likely to attract non-residents who do not pay local taxes.
- Carlsbad does not need this. Parking around Poinsettia Park cannot support it. Waste of money



- I don't have confidence in the city's judgement. I would prefer to hold off on any improvements until we have a competent, ethical city government. Thank you for asking for the citizens' opinion however. Maybe you will get a clue.
- sounds too commercial, not appropriate for the city to develop
- I don't think the city should be involved in adventure parks.
- Don't want another Disney Land in Carlsbad.
- This park is no where near me so I would not use it often. I am also not supportive of turning a free park into a pay to use park!
- Need a new City Council
- Costs of mailers to "don't sign the petition" negate this development
- The special election Carlsbad just had for the lagoon project was a total waste of tax payer money!
- Limited appeal so don't want to pay for it
- Again, we need to first put the trails near the lagoon.
- No personal use
- Stop wasting our money. Use the money already set aside to improve Agua Hedionda
- Don't vote, just do it
- There will always be nay sayers. This is what we vote people into office for.
- The outdoors are not always available to use and the cost would be a lot more to maintain an outdoor park than an inside facility
- You get enough of our money and we spend enough on elections
- Too costly when other traila need to be built now for hiking and biking and sitting on a bench
- Daily oversight needs and community liability
- Would like to see a passive-use park put in at the Buena Vista Reservoir
- This is not being built for residents! it's using city land and funds to build something for tourists and corporations use. city money and land should be used for citizens!
- Money should go to current projects of finishing Batiquitos trails under the 5 and to Ponto and the Agua Hedionda trails. Outdoor High School tracks should be open to the public outside of school open hours. The public paid for them
- Alga Norte park ha ruined the surrounding neighborhoods with noise, graffitti and traffic. we don't need another like it
- Let kids be kids! We have the beach, numerous places to workout!
- Doesn't meet my family's needs
- Put money into Carlsbad High School.
- I am confident in the city's decision making process.
- Want the money put into the tennis facility
- I wouldn't use it enough
- I already belong to a gym.
- We already pay enough
- See my 1st answer
- There are enough facilities in North County
- It is not something my family and i would use. As a prosperous cotu i would like residents to stop having to pay for things our tax dollars support. Woild like more open space.
- We don't need adventure centers. We have the beach and the outdoors. If another skate park or pump track was built I could possibly be into that but depends on the plans. The rest seems like unnecessary development.



- I don't think we need an outdoor recreation center. Enhance the existing Poinsettia Park, but please don't develop on open space.
- Not needed by my family nor by the city of carlsbad
- Build the trails and Veterans Memorial park that was to be completed in 2013!
- Don't want this park at all. I want the Batiquitos trails finished to the lagoon and I want the trails built on the AHL. The city has that money. It's time to open that lagoon up to the citizens of Carlsbad. This adventure park seems like a liability and a tourist attraction. We need more free city amenities - suitable for all
- It appears geared to tourists, not residents. Want trails on the AHL to be built. That's what the voters said with Measure A. Those for and against Measure A - we all want the trails.
- I'm not willing to give power to city managers three only out for things that give themselves financial gain. We have been taken advantage of to promote Del mar both in prop A because Del mar won't allow any commercial big mall but want it up in our neck of the woods. We support a bill to improve schools and Del mar is only schools getting real or most improvements. We get reamed with every item that sounds good but ends up benefiting other areas. My guess is most of what gets voted in doesn't actually live in this area but more south towards Del mar!
- We need trails and open space, not Disneyland? Open space carlsbad!
- I don't think it's needed
- We do not need a lot of expensive high maintenance facilities. We need outdoor space!
- We don't view a city-operated outdoor adventure park as necessary or as serving the broader population.
- Same answer as before - this project is not necessary for my family, and the city has other park obligations to fulfill first. Hub, Veterans, etc.
- You need pickleball before esoteric adventure sports
- Will not use/attend/support an Adventure Park - No interest
- not necessary as stated before
- Inept and corrupt city council, let get them out and then do things right
- Buy lagoon land instead
- I do not support the current proposed idea of an adventure park in the City of Carlsbad. I would support a "natural" outdoor adventure park that is educational to our children and sensitive to our coastal nature. The City of Carlsbad's Adventure Park should focus on a natural dirt pathway that meanders around coastal open space with an interconnecting paved pathway. Park would include picnic pavilions, and picnic areas in the outdoor adventure park.